PRESIDENT’S PERSPECTIVE

If someone told me how my term as president was going to conclude, I would have questioned their sanity or said they watched too many science fiction movies. That said, I hope you all are safe, healthy, and self-quarantined in a comfortable place. Most of us are lucky to have our CalSTRS/CalPERS pensions that are coming regularly, but please check in with your older friends and neighbors to make sure they have access to needed food and medicine. We will make it through these trying times if we take care of one and another.

I cannot sign off without thanking a few people for help and support these past four years. Firstly, Orval Garrison, Vice President and President-Elect, worked tirelessly on membership, coordinating all our exhibit tables, and performed numerous “other duties as assigned.” I have no doubt that the organization will continue to grow and prosper under his dedicated leadership. KC Walsh, Secretary/Treasurer, kept the books and the minutes, but most of all, kept me sane with her wit and friendship. Gerry Fong, CTA Staff Consultant, made sure that plans and events were successful and wrote down all the things I promised to do and made sure I didn’t forget them. Thanks also to the Board of Directors, who are the hardest working members of CTA State Council: Bonnie, Ed, Gretchen, Sharon, and Mary Rose. We have an award winning newsletter, a great annual conference, a cadre monitoring CalSTRS, student and minority scholarships, active political involvement, and activities throughout the state because we have a Board, local chapter leaders and many members who have been generous with their time and skills.

On a personal note: Appreciation to the many people who have sent me messages with words of encouragement and concern since my stroke in March. Rehab is coming along slowly but surely and it’s motivating and gratifying to hear from you all.

Stay safe and well!

Marc R. Sternberger
President
CTA/NEA-Retired

YOUR CalSTRS PENSION IS SECURE

By Dana Dillon, Former Chair of the CalSTRS Board and Incoming CTA/NEA-Retired V.P.

The volatility that Covid-19 has brought to the markets has caused concern among retirees. The same concerns were expressed during the Great Recession of 2007-2009. These are not the only challenging times CalSTRS has faced during its long history.

Created in 1913, CalSTRS began with 120 retirees and 15,000 active members. Even though the fund was underfunded, benefits were paid to retirees. Benefits were also paid during the Great Depression after the market crash of 1929.

In 1989, CTA pushed for the Elder Full Funding Act which passed in 1990. The Act would fully fund CalSTRS over a period of forty years. Ironically, boosted by the technology sector, the booming markets of the 1990s brought CalSTRS to full funding thirty years ahead of schedule.

Then, the tech bubble burst. CalSTRS was once again underfunded and, although market growth returned, the global recession quickly eliminated gains and then some. Again, retiree benefits were paid.

In 2013, CTA was instrumental in persuading the California Legislature to pass AB 1469, the CalSTRS Funding Plan. This plan is critical to CalSTRS achieving full funding by 2046. It is important to remember that with the passage of AB 1469, retiree benefits were not reduced due to the global fiscal crisis, unlike other public pension systems’ solutions.

Markets fluctuate and, as a long-term investor, the CalSTRS portfolio is built to weather these fluctuations. Besides stocks and bonds, CalSTRS’ investments include real estate, infrastructure, innovative, and risk-mitigating strategies. Put into

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CTA/NEA-Retired Board of Directors Meeting - January 24, 2020

Action Items:

a) Approved retired members Douglas Shamburger, SDEA member from Chula Vista and Sharon Orme, from San Gorgonio SCC for minority incentive grants to attend our CTA/NEA-Retired Conference.

b) Approved a motion to support the CTA Retirement Committee request for a cost study from CalSTRS on the Supplemental Benefits Maintenance Account (SBMA) options based on year of retirement or age. The SBMA supports the purchasing power guarantee of pensions.

Reports:

• Marc introduced our Elections Chair Maria Little who has faithfully served in that position for several years and is working on our transition to electronic voting.

• Gerry Fong introduced our new CTA staff support person, Nessa Connor.

• We have received over 1300 responses to participate in e-voting. Paper ballots will also be available.

• Marc reported that our RAN (Retired Action Network), which is a list of retirees who can quickly respond to GR requests to lobby on our issues, is being updated.

• Marc will be meeting with the Representation Committee chair and the CTA officers to discuss our proposal to increase the number of State Council Representatives. The number has remained at four since 1991 and our membership has increased significantly.

• Jo Carson has been named our new liaison to CARA.

• Board members reported on their activities. The primary focus has been presenting information about and signature gathering for the “Schools and Communities First” initiative.

• Bonnie Shatun spoke about the campaign for the “Schools and Communities First” initiative. The campaign plan has been approved by the CTA Board and retirees are to play an active role. Board members need to be out at local chapters collecting signatures. Our members understand this issue and have been eager to sign the petitions. People realize that corporations have escaped paying their fair share for many years. Bonnie suggested going to other organizations to collect signatures and asked that we keep track of the number of signatures we gather. There are opportunities for speakers’ training and the information on the CTA website makes giving the presentation easy.

• Alen Ritchie, NEA-Retired Executive Council, reported that the NEA Summit will be held March 15-16. The Annual NEA Retired Meeting will be held June 29-30 in Atlanta. (Both have been changed to virtual meetings.)

• Seth Bramble, CTA Legislative Advocate, has been assigned to the Retirement Committee (replacing Jennifer Baker).

Information Items:

• Our meetings are held on Friday afternoons at CTA State Council in Santa Anita A at the Westin Bonaventure in Los Angeles. All members are welcome to attend.

• Our next Board and General Membership Meeting will be held Friday, March 27, 2020 (1:30 Board/2:00 General) (Cancelled)

• Like us on Facebook: www.facebook.com/ctanearetired (No “membership” in Facebook is required.)
At the 2020 CTA/NEA-Retired Conference which was held February 27-28 at the Irvine Marriott, 129 participants had the opportunity to attend a variety of sessions including Educator Pensions, CalSTRS Investing for Our Future, Computer Security, Campaign 2020, Emergency Preparedness, Demystifying Medicare, Protecting Your Identity, Using Social Media, Travel Tips, Black History Through Quilts and more. Discounts and protections available through CTA and NEA Member Benefits were also highlighted.

At the Friday breakfast session, CTA President E. Toby Boyd told a very personal story about his experiences as a young black student and later as a parent and the special challenges minority students face. He was asked about his vision for CTA fifty years into the future. Please read his response in the box below.

Mary Kusler, Senior Director for Advocacy NEA, updated us on NEA’s many victories in the current Congressional session including significant funding increases for Title I, Title II, IDEA, ELL, and Head Start. She also spoke about NEA’s efforts to repeal the Government Pension Offset (GPO) and Windfall Elimination Provision (WEP) which severely penalize public workers. NEA has been working hard for the Social Security Fairness Act (H.R. 141) which would fully repeal both the GPO and the WEP. To date they have gotten 272 cosponsors.

Mary shared that Medicare’s solvency has improved by nine years since the enactment of the Affordable Care Act but expressed concern about the Administration’s proposed cuts which would result in higher out-of-pocket cuts for seniors. One solution which NEA supports would be to raise the Medicare payroll tax for the highest income contributors.

Mary thanked retired members for their continued activism and commitment to students and public education, emphasized the importance of the November election and encouraged everyone to volunteer, contribute to the NEA FUND and participate in the Census.

At our afternoon semi-annual General Meeting, Secretary-Treasurer KC Walsh presented our annual budget which showed 18,634 members -- a membership growth of 650 over last year. A highlight of the General Session was the presentation of the CTA/NEA-Retired We Honor Ours (WHO) Award to a very surprised Marc Sternberger.

The generous participants contributed $3,620 for the NEA Fund and $760 for the “CTA/NEA-Retired Scholarships in Memory of Sharilynn Gardella Russo.”

Do put next year’s CTA/NEA-Retired Issues Conference on your calendar. It’s scheduled for February 25-26 at the Marriott in Santa Clara and we all hope that by then we will be able to get together in person.

“In 50 years, I hope that CTA continues to be seen as the premier professional education association whose advocacy encompasses active educators, students entering the profession, and our retirees. I see CTA continuing to shape education in order to teach all our students regardless of any challenging factors and advocating for stable funding, resources and opportunities for educational success that are never dependent upon a formula or threatened by uncertainty. I see CTA viewed as the experts that we are by those outside of education. This is what I see, and it is beautiful.”

– CTA President, E. Toby Boyd
Thank you to everyone who collected signatures to qualify the Schools and Communities First for the November 3rd ballot!

"The overwhelming support for the Schools and Communities First Initiative is reflected by the 1.7 million signatures, the most ever gathered in California, to put this important measure on the ballot. At this moment, we are witnessing the need for this very measure as educators, healthcare workers, first responders and communities as a whole grapple with the COVID-19 pandemic and its effects on each one of our lives. The lack of resources has become ever-so-evident with so many students and families across California not having access to internet or computers. Schools & Communities First will help provide the resources our students, families and communities need for public education, healthcare, housing and public safety. Thank you to all who have joined with educators and our broad coalition to put this measure before California’s voters."

– E. Toby Boyd, President of the California Teachers Association, the voice of 310,000 educators in California’s public schools and colleges

It is with heartfelt sadness that we learned of Loretta Toggenburger’s passing. We will always remember Loretta as a strong and tireless champion in her determination to make life better for her colleagues, friends and family. Above all, she was a caring person with a strong will to advocate on behalf of all retirees and active members. If she befriended you, it became a lifetime relationship.

Loretta and I shared the same birthday, January 16, with our CTA/NEA-Retired President Marc Sternberger. The three of us felt we had something special in common. We will miss exchanging caring birthday greetings with each other.

Loretta was instrumental in establishing UTLA-Retired and served three terms as its president. She was a true union activist and never forgot her roots, whether it was advocating for pension enhancements, health care protections or supporting collective bargaining.

For over twenty years, she was the UTLA-R liaison to the CalSTRS Board standing side by side with CTA liaisons to protect pensions. Her institutional memory, leadership and wisdom at CalSTRS were recognized with a special tribute to her at her last CalSTRS Board meeting a few months ago.

I learned so much about CalSTRS because of Loretta’s guidance, encouragement, leadership skills and institutional memory. She was the ultimate role model and mentor.

Loretta touched so many lives and her presence will be remembered and missed. Thank you Loretta for your years of outstanding service and for being such a special friend.
CTA’S EQUITY AND HUMAN RIGHTS CONFERENCE EMPHASIZES THE NEED FOR GENERATIONAL DIALOGUE

By Mary Rose Ortega, Ethnic Minority At-Large Director

The 2020 CTA Equity and Human Rights Conference was held February 28-March 1 in Irvine, CA. The Conference began with a welcome from CTA President, E. Toby Boyd and a Racial Equity Affairs Committee Forum presented by the LGBTQ+ Caucus and the Women’s Caucus. The discussions included “What are our Similarities and our Differences and how they bring us together” and “A Progressive Dialogue on Race.” Topics included social justice, legal issues in education, equality and safety for all our students and educational funding.

The conference workshops focused on social justice and educational issues, bias and bigotry on campus, women and STEM, and talking about color (racial). One of the excellent workshops I attended was “The Intersectionality of Organizing” by Tamisha Brame Carter and Mary Levi which centered on how to organize locals so all members are involved and have a voice and can take leadership roles. It is especially important for us to reach out and get our retired minority members involved in our CTA/NEA Retired Chapters.

The Saturday session was facilitated by the conference committee along with Student CTA. It was a generational session to engage members in terms of their different experiences with the social justice movement. The dialogue was meant to help us understand multiple perspectives on events. Most cultures take a generation (15-20 years) to change meaning or create new language, yet in today’s world of technology and social media, we see an acceleration of these changes. So, experiences within generations can also be very different. These experiences were often different by race, geography, gender identity, social economics, and religion. The participants were divided into 9 rooms and in two phases: Within Generations and Mixed Generations. They were asked questions and shared reactions. One example was when and where did you first hear the song “We shall Overcome” sung by Pete Seeger and what feelings does it create for you? The perspectives were varied and quite interesting.

As always, the CTA Human Rights Dinner and Awards recognized amazing educators for the work they do in their communities beyond their daily work as educators. This year the San Diego Service Council won the CTA Service Center Council Human Rights Award for their partnership with other community organizations and the University of San Diego to create a series of social justice themed, day-long professional development symposiums, in which members can earn salary schedule credit.

YOUR CaISTRS PENSION IS SECURE

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place after the Great Recession, some of these investment strategies are actually performing well right now, underscoring the importance of fund diversification and risk-mitigation. For more information on the CalSTRS portfolio, the following link is to the report of the Chief Investment Office for the May 7th CalSTRS Investment Committee meeting: http://resources.calstrs.com/publicdocs/Page/CommonPage.aspx?PageName=DocumentDownload&Id=c6ac1a79-a62d-4ebb-9177-fb0b2d232a17

Remember, that in good times and bad, CalSTRS retiree benefits have been and will continue to be paid.

Don’t forget, it is our guaranteed benefits that help our local economies survive because retirees use those funds to purchase goods and services in their communities!
One happy surprise at the 2020 CTA/NEA-Retired Issues Conference in Irvine was the selection of outgoing president Marc Sternberger as the 2020 recipient of the Ellen Logue CTA/NEA-Retired WHO Award. This annual award is given to “an outstanding retired educator, someone whose impact on public education is admirable . . . and who has provided specific contributions to retirees through innovative projects or remarkable successes.” The recipient does not have to be an Association officer and usually is not.

This year’s recipient, Marc Sternberger, is someone who has fully met the multiple requirements for selection. In addition to completing the many tasks of president, Marc has tackled the development and management of the Retired Facebook page, ensured that ALL CTA Service Center Councils have attending and informed Liaison coverage, written and received multiple grants from NEA for mentoring projects and expansion of our RAN (Retired Action Network) lobbying group, shepherded new chapter startups, and taken Retired “on the road” by going out with Board members to distant regions highlighting membership growth and chapter organizing strategies. In addition to lobbying in Sacramento, Marc has also embraced a focus on Member Benefits as a useful tool in building Active and Retired membership.

The selection process is governed by Standing Rules. As awkward as this was to accomplish, Marc was completely unaware of his selection until its announcement at the Retired Issues General Membership meeting on February 28. Now and then, a worthy recipient deserves a surprise!

MARC STERNBERGER RECEIVES THE ELLEN LOGUE OUTSTANDING RETIRED EDUCATOR “WHO” AWARD

By Orval Garrison, Vice President

At the CTA/NEA-Retired Annual Issues Conference in February, participants had the opportunity to hear presentations from CalSTRS CEO Jack Ehnes (top picture) about how CalSTRS meets the challenges ahead and protects pensions for its 964,661 members and beneficiaries.

Bay Valley-Retired members enjoyed touring Frank Lloyd Wright’s Hollyhock House which was recently named a UNESCO World Heritage site. It’s located in the Barnsdall Park area of Los Angeles. After the tour, they relaxed over lunch at a nearby restaurant.
YOUR HELP IS NEEDED

By KC Walsh, Secretary Treasurer

The November election is more important than ever! I know we say that every election cycle, but I trust you’ll agree with me in this time of pandemic. Public education, our economy, our public pension, MediCare and even the personal safety of ourselves and our families are at stake.

The NEA Fund for Children and Public Education is the NEA PAC (Political Action Committee). No dues money is used for this purpose. All contributions are voluntary, are not tax deductible, and are used for NEA’s political activity. The Fund keeps us in the game when it comes to protecting Social Security, Medicare, public pensions, and funding for public education.

Since the NEA Representative Assembly, which was scheduled for July 2-6 in Atlanta, has been changed to virtual, it’s given us a fundraising challenge and an opportunity. Delegates are generally asked for a $200 NEA FUND donation and most donate more. Retired delegates are also asked to donate at our NEA-Retired Annual Meeting through live and silent auctions. But, every NEA member is needed, invited and encouraged to help.

NEA, the PAC and the PAC captains have been brainstorming fundraising ideas. It looks like we will have an online platform for a silent auction that will be open to ALL NEA members. Additionally, we will have a beautiful quilt up for auction. We are looking for other ideas and more information will be forthcoming. Watch this space and our Facebook page, CTA/NEA Retired, for other opportunities. You can donate any time at www.neafund.org. Please give whatever you are able to give.

CTA AND NEA RESPOND TO COVID-19

It is not “news” to state that COVID-19 has disrupted the education system in the U.S.—schools closed, events cancelled, enrichment suspended.

Yet, CTA, CTA/NEA-Retired, NEA, NEA-Retired and our members across the nation have stepped up to help keep learning and education a priority:

• CTA Primary Contact Staff assist locals in implementing online teaching and learning strategies.
• CTA also advises chapters of bargaining priorities to protect educator rights and to combat against panic demands that impede effective teaching.
• CTA created and regularly updates an online COVID-19 page: How educators can help students, what schools and partner organizations should do, how to talk to and teach students about COVID-19 and more. Go to www.cta.org click the QUICK LINK COVID-19 Resources for Educators. Also, on the www.cta.org welcome page, scroll down to NEWS & MEDIA for three more interesting articles.
• NEA lobbies for CARES (Corona Aid, Relief, & Economic Security Act) to include $30.7 billion in an Education Stabilization Fund, the HEROES Act (Helping Emergency Responders Overcome Emergency Situations Act of 2020) which also includes money for schools. NEA also emphasizes that more is needed for internet access in rural and poor schools and to address student loan forgiveness. To stay informed about these issues go to NEA.org/CovidAction and also text Action to 84693 to receive updates.
• NEA-Retired acknowledges that retired educators are returning to help stretch educator resources affected by loss of classroom time and the need to go visit students. Retirees are even using quilting skills to produce masks.
• CTA/NEA-Retired members help at food banks, provide food for teachers to deliver to students, and support teachers, students, and their families in crisis.

There are real life stories behind these efforts. Just check CTA.org and NEA.org websites to learn more. Also, do keep in touch by checking our Facebook page www.facebook.com/ctanearetired and cta nea retired communications. (No “membership” in Facebook is required.)

On May 1, High Desert Retired held their first chapter meeting using ZOOM although many joined the meeting by phone. Co-President Anne Johnson-Curtis (picture on the top left zoom screen and at her computer in the picture on the right) held a brief business meeting which included a discussion about how to welcome new retirees without being able to meet and deciding to invite an emergency preparedness presenter (via ZOOM) for their June meeting. Each member then shared how they were spending their time at home. Among the responses were exercising, cooking, sewing masks to donate, gardening, volunteer phone calls for CTA endorsed candidate Christy Smith (CD25), long distance learning with students, delivering food to those in need, participating in a virtual half marathon for charity, organizing and cleaning out the garage, and one announced the birth of a new grandson.
The 2020 officer, Board, and RA Delegate election, which was conducted through online voting, was a new adventure for CTA/NEA-Retired. Using Simply Voting, a company approved by CTA, members were able to vote online. Paper balloting was also available for those who preferred. The online voting generally went smoothly, and most voters used that system. Switching to online saves literally tens of thousands of dollars. The Board will review this online voting experience, weighing the pro and con of it.

Congratulations to newly elected officers and Board member: Orval Garrison (President), Dana Dillon, (Vice President), Debra Sheehan (Secretary-Treasurer) and Virginia Torres (District 4 Director). Complete results which include RA Delegates are available at CTA.org/Retired.