My message for this newsletter edition begins with some thank you’s. From an Association perspective, I want to thank the many retirees who got involved in the 2020 election cycle. While I was phone banking in support of Prop. 15, I noticed again and again other CTA/NEA-Retired members who were there on screen, taking part in the effort to contact members. No, the initiative did not pass, but we all—Active and Retired—gave it our best. We retirees, perhaps more than others, know that elections come and go. You win some, you lose some, and you tackle the next challenge or the same one again.

Thanks to our members who have demonstrated caution and common sense by not gathering in groups during the holiday season. As retirees, our life reality puts us in a particularly vulnerable demographic group. Thank you for making sensible decisions about travel and gathering.

Additionally, I express my appreciation to the many local retired chapters that have continued adapting to the pandemic by having Zoom or Webex meetings, showing that we will not be stopped in our tracks just because, temporarily, we do not come together as much in person. There also have been some very successful outdoor events with social distancing in place. In the last ADVOCATE I asked that we in leadership be invited to local virtual meetings, and you have responded impressively. Other officers, Board members, and I have attended local chapter Zoom meetings. We have received many email messages of support, and we thank you all for being there and carrying on.

CTA/NEA-Retired business also carries on. Our Board of Directors meetings and State Council participation, attendance at CalSTRS meetings, advocating for equitable SBMA (Supplemental Benefits) pension purchasing power, lobbying with NEA for GPO/WEP Social Security Fairness, and attempting to assist and grow local chapters—all of this continues as we strive to make things work in a mainly virtual world. Additionally, the Board has been working in multiple Zoom gatherings to organize the 2021 CTA/NEA-Retired Issues Conference (March 2 - 5, 2021). This will be our first virtual Retired Issues Conference, spread over more days than usual in the hope of avoiding screen burnout. Information about registration is in this issue.

One of the ways that the CTA/NEA-Retired Board is trying to help local chapters is by extending the $300 assistance program to all chapters. Previously, only chapters that were newly organizing or attempting to revitalize or restart themselves were eligible for up to $300 of reimbursement for chapter organizing expenses. At the October 23, 2020 Board meeting, the Board voted to make that assistance available to all chapters, given the outreach challenges facing them during the pandemic.

Finally, CTA/NEA-Retired will be anticipating the next “Online/Electronic” Voting for our 2021 NEA-RA Delegates and State Council Seats. Voting information is included in this issue. Declaration of Candidacy forms are available in the December/January California Educator with instructions, deadlines and how to return.

The best to all, be wise, stay safe!
CTA/NEA-Retired Board of Directors Meeting - October 23, 2020

Action Items:

a) Approved the 2020-2021 CTA/NEA Retired Goals, which are similar to the 2019-2020 goals
b) Approved financial assistance to chapters of up to $300, as requested with receipts
c) Approved changes to Standing Rules that deal with emergency situations such as a pandemic; the Elections Committee; Outreach Programs; and WHO Selection Committee. Standing Rules changes (amended in October 2020) will be reflected at the CTA/NEA-Retired website, along with current Bylaws.
d) Approved action to refer additional Bylaw changes to the CTA Retired Issues Conference Business Meeting on March 5, 2021. See proposed changes on page 7 of this issue.
e) Approved the Bylaws for the new Antelope Valley-Retired and the revitalized Tulare/Kings chapter

Reports:

• Rose Luna, CTA staff for the State Council Retirement Committee, sent Retirement Workshop WebEx dates to all Service Centers. There will be two per month. She will record a non-interactive session and ask for pictures for the upcoming issue.

• President Orval reported that the Board met virtually for 6 days for our Summer Planning Session and discussed goals, issues, and projects. He announced that our NEA Grant timeline for our Retired Action Network (RAN) program has been extended. Orval reported on the progress of our CTA Prop. 15 campaign, with Bonnie describing ongoing plans for action and upcoming phone banking. Board planning sessions were announced for our 2021 CTA/NEA-Retired Issues Conference in March 2021. An invitation to join the CTA Higher Education Caucus was discussed and a decision is pending. Increasing CTA-Retired representation on CTA State Council was discussed and is pending.

• Secretary-Treasurer Debra Sheehan reported that our membership increased by 131 since September 2019. The Russo Scholarship Fund current total is $16,018, with two checks still to be deposited. Donations are coming in and are very welcome. She reported that we saved approximately $20,000 by holding our election virtually. A discussion was held about how to use these savings. Ed shared that excess funds at the end of the year go back to CTA. Debra will research the past 12 years to chart how much end-of-the-year surplus CTA-Retired has had.

• The Board Members reported on chapter happenings in their area including participation with CTA Campaign Activities.

• CTA Staff Consultant Brian Stafford was introduced. Gerry Fong was thanked for her ten years of service to CTA/NEA-Retired. Brian mentioned that he was first trained by Gerry 12 years ago. Brian put a link into our Chat feature as a part of our call for members to sign up for CTA Prop. 15 phone banking. Brian asked for retired members to sign up to participate with the CPC (Commission on Professional Competency).

• Bonnie Shatun reported that our award winning Advocate newsletter was rushed to be in our members hands prior to the Nov. 3 election. She thanked contributors and asked for pictures for the upcoming issues.

Information Items:

• The elections for the 2021 State Council seats and NEA Representative Assembly will be announced in the December Advocate.

• Members attending thanked Gerry Fong for her service, commended the Board on today’s meeting, and asked for a virtual teaching workshop at our March 2021 Retired Issues Conference.

• New CTA-Retired Membership cards will be attached to the next Educator.

• The Next Board Meeting will be held Friday, Jan. 22, 2021, assuming no virtual/online conflict necessitates a change. Members will receive an email which will include a link to attend.

• Like us on Facebook: www.facebook.com/ctanear (no “membership” in Facebook required)
CTA/NEA-Retired was well represented when the CTA Retirement Committee convened virtually on Oct. 22nd. Once again, kudos to the Retirement Committee Leadership and staff for putting together an informative agenda.

The largest chunk of time was given to David Lamoureux, CalSTRS Actuary, who presented the report CalSTRS will be submitting to the state legislature regarding the surplus in the Supplemental Benefits Maintenance Account (SBMA) and options for its use. David also gave a history of the SBMA and historical trade-offs when the SBMA was changed legislatively. Trade-offs included the state reducing payments into the SBMA. Key to any discussion about the SBMA, is the fact that the state is obligated to make contributions to the fund and while payments might have decreased, there is a surplus. CalSTRS is required to provide options to the legislature about how benefits might be enhanced while maintaining solvency. David reiterated the decision of the CalSTRS Board to support Option 1 if that option came forward legislatively. Supported by CTA/NEA-Retired, Option 1 was the focus of an article in the last Advocate and more information will be forthcoming in future Advocate articles.

In other business, the Committee declared State Council’s NBI 1/20-2 Moot. The NBI asked for CTA to explore the feasibility of legislation removing the six-month (180 day) moratorium on working for a district upon retirement. Current law allows districts to request a waiver for the purpose of dealing with a substitute teacher shortage. Please note that a retiree can currently work during that time, but their retiree benefit would be cut by the amount of money they’ve earned working.

Seth Bramble, CTA Legislative Advocate, updated the committee on the final disposition of legislation affecting CalSTRS and CalPERS. The CalSTRS and CalPERS technical bills passed. The CalSTRS bill clarified “leave of absence” service credit among other CTA supported changes. Seth also gave a brief history of the SBMA and cautioned the committee about the trade-offs the legislature has made when changes were done.

CTA staff reported on the “California Rule” case before the California Supreme Court. The “California Rule” is a series of state court rulings believed to mean the pension offered at hire becomes a vested right, protected by contract law, that can only be cut if offset by a new benefit of comparable value. In July, the Court decided the legislature could change pension provisions “for the constitutionally permissible purpose of closing loopholes and preventing abuse,” and that eliminating spiking to protect the solvency and integrity of a pension system is consistent with the “California Rule.” The Court left the “California Rule” itself untouched. Yay!

An update was given on the state of CalSTRS investments. It’s been a bumpy ride through the pandemic, but changes made to the portfolio after the global financial crisis are working. CalSTRS had a 3.9% fiscal year return and added about $10 billion worth of assets – CalSTRS is now at $246 billion. As a side note, CalSTRS has shared that there was not a noticeable increase in retirements this summer over the previous year.

On December 11 our High Desert Retired chapter met for an outdoor TGIF. After enjoying snacks and beverages at socially distanced picnic tables, they walked and visited for 2 1/2 miles along the Mojave River Walk. One member drove 60 miles to attend. At this time they usually bring canned goods and toys to their holiday luncheon. This year they sent donation information out and one of their members picked up and took everything to the nearby Rescue Mission where he volunteers.

Did you know that all upcoming CTA Conferences during this school year will be held virtually and all CTA active and retired members are welcome to register and attend at no charge. You will certainly want to attend our CTA/NEA-Retired Issues Conference March 2-5. But, do also take a look at CTA’s other wonderful conferences and events and consider registering and attending from the comfort of your home. To learn more and to register go to www.CTA.org/Conferences.
Come join us for the 17th Annual CTA/NEA-Retired Issues Conference! You don't have to be retired to attend. If you are retired or are considering retirement in the next few years you will benefit from the information offered by speakers and workshops on a variety of issues.

"Retirement in the Digital Age"

Attend this conference to learn how you can stay connected, be protected & enjoy great benefits

Plan to Attend Sessions to...

- Find out about local CTA/NEA-Retired chapters & events in your area
- Get involved in our Lobbying Network
- Make Sense of CalSTRS and Public Employee Pensions
- Negotiate the Healthcare Maze - Medicare & the Affordable Care Act
- Be Updated on NEA’s Advocacy for Federal Retirement Security (Protecting Social Security & Repealing GPOIWEP)
- Discover the CTA/NEA Member Benefits including many savings available to you!
- Begin Exploring Your Genealogy
- Learn about Staying Healthy and Active in Retirement

SPEAKERS AND PRESENTERS to inform and inspire!

E. Toby Boyd - CTA President
Mary Kusler - Senior Director - NEA Center for Advocacy
Jack Ehnes - CalSTRS - Chief Executive Officer
And more!

REGISTRATION IS FREE TO MEMBERS
FOCUS ON STANISLAUS CTA/NEA RETIRED

By Llewellyn (Lew) Boyle, President

Where is Stanislaus? This is a common question. Stanislaus County is a San Joaquin Valley community that has become an emerging center of agriculture, food processing, education (CSU Stanislaus), and commerce. And, in 2012, the Stanislaus service area established its own CTA/NEA Retired chapter.

Led by Bob McDonough, Don Rowe, Cherie Lamoreaux, and Debbie Savage, and assisted by CTA Retired leaders, the Stanislaus CTA/NEA Retired chapter was formed in May 2012. The group adopted organizing principles focusing on activities important to retirees such as CalSTRS pensions, health and Medicare, Social Security offsets, involvement with local CTA chapters, and sponsoring enjoyable social events. Oh, and the group vowed to have some fun while pursuing these goals.

Since its founding, the chapter has grown and flourished. Presidents Bob McDonough and Don Rowe helped the group focus its activities in three general areas: activism and political advocacy, service to the Ceres RRC/Stanislaus SCC, and social activities. Business meetings occur four times a year augmented by speakers from agencies providing services on topics of interest to retirees, such as HICAP, Senior Legal Assistance, and computer security.

Over the past seven years, Stanislaus CTA/NEA Retired has participated in local demonstrations in Patterson, Denair, Turlock, Riverbank, and elsewhere, centered on assuring fair and equitable contracts for the local CTA bargaining units. Members also participate in Lobby Day at the state Capitol, do phone banking for education-related propositions, and support union-friendly local school board candidates. Guided by Charley James, the local CTA Retired political action liaison, the group is an active member of CARA.

Service to the RRC has included providing retirement workshops, attending Service Center Council meetings, and assisting with local CTA elections. Our retirees act as bartenders at the RRC annual “Tacos for Teachers” event. We also participate in the annual Relay for Life and support the CTA/NEA-Retired Russo Scholarship fund.

The group has taken a number of field trips, including Amtrak trips to Sacramento to tour CalSTRS and the Old Sacramento Underground, a tour of local food processor Hilmar Cheese, and Dust Bowl Craft Brewery. Chapter Secretary Paul Prescott, a docent at Big Trees State Park, recently guided members on the North Grove Trail of the park. All outings have been very popular. Every summer, the chapter sponsors a “You Don’t Have To Go Back” luncheon for new retirees. This social function serves as a recruiting device as well.

The pandemic of 2020 has sent us into the digital virtual mode. A survey of chapter leadership yielded goals for the rest of 2020 and beyond. They are be more visible in local community agencies and activities, return to a less digital environment when possible, and strengthen ties with local and national political operatives. Our leadership also stresses the need for retirees experienced in union activity to emphasize to those entering the profession the need for strong, unified pro-labor practices.

Finally, chapter Board Member Cherie Lamoreaux keeps our Stanislaus CTA/NEA Retired Facebook account up to date and informative (Stanislaus CTA/NEA Retired).

Also, Vice-President Eric Julien oversees our website (www.ctaretiredstanislaus.org). Do take a look at them both. According to current President, Llewellyn Boyle, “2020 is providing more than its share of challenges. Fortunately, with the talents and commitment of our membership and our leadership, our future looks strong.”
ON-LINE/ELECTRONIC VOTING RESUMES
THIS IS YOUR OPPORTUNITY TO VOTE!

CTA/NEA-Retired had great success with on-line/electronic voting last year. Members chose overwhelmingly to use the electronic voting option sent to their email address. Over $20,000 was saved by using the on-line system. We will continue with the electronic option for 2021 voting.

Spring 2021 NEA-Representative Assembly/NEA-Retired Annual Meeting Delegate Election and the four District Director/State Council Elections are coming. Declaration of Candidacy forms are in the December/January California Educator.

All CTA/NEA-Retired Members will be able to vote on-line using email addresses on file. Members who voted by mail last year will be able to do so again in 2021.

NOMINATIONS ARE OPEN

2021 ELLEN LOGUE
WHO (WE HONOR OURS) AWARD

Annually, CTA/NEA-Retired honors one member who has continued to be active in their retirement by exhibiting leadership in the Association, in public education and in the community. The recipient will be recognized at our General Membership Meeting at the conclusion of the

17th Annual CTA/NEA-Retired Issues Conference to be held virtually March 2-5, 2021.

Past winners of the award are:

- 2020 - Marc Sternberger
- 2019 - Jim Burfeind
- 2018 - Robert “Bob” McDonough
- 2017 - Frank Tarantino
- 2016 - Arlene Pavey
- 2015 - Bonnie Shatun
- 2014 - Val Muchowski
- 2013 - Orval Garrison
- 2012 - Tim Jenkins

Nomination forms can be found online at www.cta.org/retired. If you would prefer to receive the form in the mail, please call CTA/NEA-Retired at 650/552.5439 or email CTA-Retired@cta.org. Deadline for submission is February 5, 2021 at 5:00 pm.

***NEWTLY RETIRED MEMBERS***

If you retired this year, you must notify the CTA Membership Department by calling 650-552-5278 or send an email to membership@cta.org notifying CTA of your change in status. You will not be able to vote in the CTA/NEA-Retired elections or run for "retired" offices if you are still listed as “Pre-Retired.”

TO LOCATE A LOCAL RETIRED CHAPTER IN YOUR AREA GO TO: www.CTA.org/Retired and click on the LOCAL CHAPTERS tab at the top.
ARTICLE IV – MEMBERSHIP

Section 6. Rights of Partner Membership

New f) Partner Members must be Life Members of NEA-Retired. Current f), g), h) change to g), h), i)

ARTICLE X – NOMINATIONS AND ELECTIONS

Section 2. Conduct of Elections

a) All CTA/NEA-Retired elections will be monitored by the CTA/NEA-Retired Elections Committee which, when applicable, shall be informed of any electronic voting procedures conducted by a Board-selected electronic voting vendor.

b) CTA/NEA-Retired may contract with the California Teachers Association to conduct the elections of CTA/NEA-Retired officers, State Council of Education representatives, and delegates to the National Education Association Representative Assembly. This process may include a CTA-approved vendor chosen by CTA/NEA-Retired to conduct electronic voting.

c) CTA/NEA-Retired may conduct elections through electronic voting and/or by mailing information and ballots to eligible voters, as determined by the Board of Directors.

d) The CTA/NEA-Retired election rules and procedures may be amended by a majority vote of the Board of Directors.

ARTICLE XI – MEETINGS

Section 1. Annual Business Meeting

a) The Annual Business Meeting of CTA/NEA-Retired shall be held, in-person or virtual, at a time and place or in reasonable proximity of the fourth CTA State Council meeting of the year.

Section 2. General Membership Meetings

a) There shall be a General Membership Meeting, in-person or virtual, at the CTA/NEA-Retired Annual Retirement Issues Conference. Items of new business may be introduced and voted on by the members attending this Membership Meeting. Membership Meetings may be called by the CTA/NEA-Retired Board of Directors with at least a thirty-day notice to the membership.

ARTICLE XIV – AMENDMENTS

Section 3. Adoption

Adoption of proposed amendments shall be by a majority of those members present and voting at the Annual Business Meeting, held in proximity of the fourth meeting of CTA State Council, or at the General Membership Meeting, held in proximity of the CTA/NEA-Retired Annual Issues Conference.

Thank you to everyone who wrote post cards and letters, phone banked, texted, talked with friends and family, voted and worked to elect candidates and pass ballot measures supporting public education!
Happy Holiday Season

Wishing a happy, healthy and safe holiday season and new year from the CTA/NEA-Retired Officers and Board of Directors to you and your family!

Orval Garrison, President
Dana Dillon, Vice President
Debra Sheehan, Secretary-Treasurer
Gretchen Lipow, District 1 Director
Ed Foglia, District 2 Director
Bonnie Shatun, District 3 Director
Virginia Torres, District 4 Director
Mary Rose Ortega, Ethnic Minority At-Large Director