



AASRA Newsletter

All Arizona School Retirees Association
affiliated with NRTA, a division of AARP

Spring 2019

Volume 57 No. 2

AASRA Convention – June 4-5, 2019

AASRA Keys to Success-Unlocking Our Future



Hotel

Four Points by Sheraton
Phoenix North
2532 W Peoria Ave.
Phoenix, AZ 85029

Hotel reservations – ask for the
All Arizona School Retirees
Association Group Rate at \$79
per night for 2, extra for more.

602-943-9057

The registration fee is \$80

includes 4 meals

Use the form in the newsletter.

**Registrations for the
convention and the hotel are
due May 25.**



MONDAY, JUNE 3rd

3:30 to 5:10 pm

5:30 pm -7:30 pm

TUESDAY, JUNE 4th

6:30-8:30 am

7:00-8:45 am

9:00 -9:20 am

9:20 – 11 am

12:00 -1:30 pm

1:45 –4:00 pm

3:00 - 4:00 pm

4:00 - 4:30 pm

4:30 - 6:00 pm

6:00 – 9:00 pm

WEDNESDAY, JUNE 5th

6:30 – 8:30 am

9:00-10:30 am

10:45 am

(Tentative Schedule)

Early Registration (near Ballroom Salon A & B)
(The hotel check-in time is 3:00 pm)

SOCIAL MEET UP at Garcia's

3301 West Peoria Phoenix, AZ 85029

BREAKFAST BUFFET

(All meals included in registration fees. You do not
need to stay at the hotel.)

Registration & vendors (near Salon A & B)

GENERAL MEETING

Welcome & convention information

Interest groups -2 sessions with a Break between

Followed by more convention information & a break

LUNCHEON BANQUET

Kathy Hoffman, AZ Superintendent of Public Instruction

BUSINESS MEETING reports, elections, voting, etc.

Information & workshops

Drum Circle

Free Time

DINNER BANQUET - Awards - Raffles – Entertainment,
The Rosewood Rascals

BREAKFAST BUFFET

GENERAL MEETING

John Moody, Legislative Consultant, Paul Matson, ASRS
Executive Director

TIME OF EMBRANCE

Convention ends after the Time of Remembrance.

Hotel check out is 12:00 noon.

Constitution & Bylaws Package

The AASRA Board on January 28, 2019 approved this package. **This is an addition of an appointive officer to our documents.** The amendment package will be voted on by convention members at the state convention. All new text is written in *italics*. Example: *New*

Constitution

Article V - Officers

Sec. 6 Appointive Officers

A. Appointive Officers shall be:

1. The NEWSLETTER Editor
2. The Parliamentarian
3. The Historian
4. The Arizona State Retirement Board Liaison
5. The AARP Arizona Liaison
6. *The Legislative Liaison*

B. The Appointive Officers shall be appointed by the President and approved by the Board of Directors for a two year term. The duties of the Appointive Officers shall be fixed by the Association Bylaws.

Bylaws

Article III - Duties of Appointive Officers

SEC. 6 *The Legislative Liaison:*

- Shall serve as the designated lobbyist for AASRA.*
- Shall serve as Chairperson of the Legislative Team.*
- Shall study and monitor current state and national issues and trends relating to public pension systems and education policy.*
- D. Shall present Legislative Team Committee reports and recommendations to the state board.*
- Shall assist with communication to units and members regarding legislative issues.*
- Shall serve as a resource to units and members.*
- Shall advise and assist the President and President-elect regarding legislative issues.*
- Shall represent AASRA on legislative issues to the Legislature, other organizations and individuals as necessary.*

Rationale: The work that is expected of the person in this position is no different or less important than that of the ASRS Liaison or the AARP Liaison and therefore should be accorded the same designation as an

Appointive Officer. Additionally, this change makes it easier for the President to appoint a designated lobbyist who may not be the chairperson of the Legislative Team if necessary. The term "Legislative Liaison" is widely accepted as synonymous with "lobbyist", but without the negative connotation that frequently accompanies the latter term and more accurately describes the position to legislators and others than "Legislative Team Chair".

2019 Election of Officers

June 4th is the date for the election of AASRA officers for the 2019-2021 membership years. The offices being voted on this year include 1) AASRA President-Elect, 2) State Secretary, 3) State Treasurer and 4) the District Vice -Presidents for Districts 2, 4, 6, & 8. The election will take place at the business meeting on the first day of the annual meeting.

All positions are open for nominations from the floor. However, if anyone wishes to place themselves into nomination, it is recommended that you contact the Nominations Chair, Steve Poe (sshermanpoe@gmail.com) to allow for the printing of ballots ahead of the meeting.

At press time, the office of AASRA President-Elect position has as a candidate, Joanna Haspels of Kingman, who has been the interim Pres.-Elect since she was appointed last fall. If you recall, Jerry Holmes, the most recent person elected to the position, moved into the Presidency upon the resignation of the then current President in the summer of 2017. As is true with all the positions to be elected, this position is open to nominations from the floor on June 4 or to candidates who declare between now and the day of the business meeting.

Candidates who have also consented to being on the ballot for the June 4th election include: the current Secretary, Pearl Nancarrow of Globe, Debbie Duncan of Tempe as District VP in Region 2, Bob Ingram of Yuma as District VP in Region 4, and AnnJi Craig-Wooten of Safford as District VP in Region 8. **That leaves the possible vacancy in the State Treasurer position (as of press time) and the vacancy in the Region 6 District VP position**, currently held by interim appointment, Steve Poe the current AASRA Past-President, who is not a candidate for the VP office representing the Tucson area.

We encourage all AASRA members to consider running for office to serve on the State Board. Board members are expected to attend 4 yearly meetings plus the annual State Convention (Annual Meeting). Board participants are reimbursed for their travel expenses to the 4 yearly meetings and some other possible expenditures made to fulfill their duties.

Steve Poe, Nominations Committee Chair

Speakers & Entertainment

Kathy Hoffman was elected State Superintendent of Public Instruction in November 2018 and assumed office in January 2019. Superintendent Hoffman has spent her entire career working in public education, first as a pre-school teacher and then as a speech-language pathologist. She began her career in the Vail School District in Southern Arizona before joining the Peoria School District.



Her experience as both an educator and advocate for students with disabilities informs her vision for public education. Throughout her career, she has fought tirelessly for equal access to high-quality public education regardless of a student's race, gender, or zip code. She asserts that only through committed investment and inclusive policies can Arizona bring its public schools from the bottom to the top of the nation's school systems. Superintendent Hoffman firmly believes that Arizona's future starts in our schools.

Other speakers are: **John Moody**, AASRA Legislative Consultant and **Paul Matson**, ASRS Executive Director.

The Rosewood Rascals

The Rosewood Rascals is a six to eight member marimba ensemble that uses three marimbas, a xylophone and drum set. Other instruments can be added.

Scholarship Raffle Fundraiser

Units are making gift baskets and bringing other higher value items. There may be only 10 – 20 items. **Basket tickets will be \$1 or 6 for \$5 and 50/50 raffle tickets will be just \$1.** This is the biggest and only fundraiser for the Scholarship Foundation.



Units bring these items to the

Convention:

Lots of smiling members

Your unit's display board

Basket or quality item for the

Scholarship Raffle



Members bring plenty of cash and/or checkbook to donate to the Scholarship Foundation events

ASRS Report

ASRS is number 5 out of 63 funds in the nation among its peers. It is one of the best in the country. The ASRS funds returns were 9.4%.

Protecting our Pension is AASRA's #1 goal.

Remember: **ASRS IS AN EARNED BENEFIT**

AASRA is a member of The Arizona Retirement Security Coalition (ARSC), which is providing information to inform Arizonans the truth about defined benefit (DB) pensions. **ASRS is a defined benefit pension.** There are groups in Arizona, which wants to change our pension to a Defined Contribution (DC) pension plan, similar to a 401(k). It is very important that each of us knows the value of our DB pension and to inform the public that we paid for it. Our pension is cheaper to fund and will provide us with a pension for the remainder of our lives.

The **ASRS Health Committee** will be meeting in April.

Jerry Holmes, Barbara Weber and Janet Fee will be attending. The agenda of topics includes an update regarding the transition to the new Medicare Advantage PPO plan, potential plan design adjustments and changes for the 2020 plan year and a brief presentation from a State Health Insurance Assistance Program (SHIP) representative. If you any questions about the meeting, please let us know.

The new federal tax tables and 2019 retiree insurance premiums were applied to pension checks in February and may affect your net benefit payments. As you did your taxes, you may want to check to see if you need to update your withholding.

Janet Fee, ASRS Liaison

The question isn't at what age I want to retire, it's at what income.

George Foreman

President's Message

When **Arizona became a state in 1912** one of the first acts of the state legislature was to **put in place an equitable pension for retired educators**. That pension, \$150 per quarter or \$50 per month, equaled about 2/3 of the annual salary of a teacher at the time. The **payments were made from the General Fund** of the state. That meant the legislature had to **allocate money for the pension funds in each year's budget**.

However, by **1950 that benefit amount was unchanged**. The once reasonable amount was inadequate to sustain a retiree. **Many retired teachers were destitute**. In addition, **state government employees, who included educators, were ineligible to receive Social Security benefits**. Concerns about taxation of states, a necessity to accomplish matching employer contributions for state employees, had forced Congress to leave state employees off the lists of beneficiaries when the Social Security Act was passed in August of 1935.

In **1950 the Southern Arizona Retired Teachers Association (SARTA) was formed** by retired educators in Tucson and other southern Arizona towns for the **purpose of advocating for increased retirement security for educators**.



Sparked by the advocacy of NRTA and AARP founder **Dr. Ethel Percy Andrus**, **SARTA set a goal to increase pensions for retirees**. It took two years to accomplish, but with the assistance of the newly founded Maricopa County School Retirees Association, the advocates **achieved their goal and pensions were increased** for retirees.

Since those earliest days of advocacy, we have seen many changes, internal and external, in our organization. **Seeing the benefits of collaboration, the founders maintained the integrity** of the Southern Arizona and Maricopa units, but **formed an umbrella organization Arizona Teachers Retiree Association (ARTA) to cover the state**. That organization is the precursor to today's AASRA. Units were founded in other parts of the state including Arizona's booming small towns. Members joined from Bisbee, Douglas, Yuma, Prescott, Flagstaff, Globe, Safford, Nogales, Kingman and Sedona among other places.

More changes in the retirement system were encouraged by ARTA and adopted by the state legislature. Pensions increased on several occasions through the years and **public employees were allowed to join Social Security**. **Pension funds were set aside in a separate fund from the state's General Fund**. Later, the Arizona State Retirement System was formed to manage those funds. More recently a constitutional **amendment was passed guaranteeing that a retiree's benefits could never be reduced**.

Along the way there were changes in ARTA, as well. Those included a **name change** to All Arizona School Retirees Association (**AASRA**) as the **organization made steps to include more than just teachers in the membership**. However, along the way **our primary purpose has remained the same - to be advocates for education, educators and those working in the educational system**. **We do not take political sides in elections or endorse candidates**. AASRA's members are free to support the candidates of their choice.

We do take positions on issues such as vouchers, adequate educational funding and accountability for charter schools. Those positions are not whimsically adopted, but the process of extended study and debate among the officers of the organization. **We seek input from our members and respond to your concerns as we form positions**.

Our most recent area of concern is the same that led to the founding of an organization. There are those that **want to change the Arizona State Retirement System**. Under the guise of providing "choice" to new enrollees, certain individuals want to change the system for public employees' enrollment in ASRS. **As with education, the introduction of "choice" is a euphemism for privatization and profit taking from pension funds**.

As soon as AASRA **heard about** conversations regarding **proposed changes** to the system **our board voted to join with other organizations to form the Arizona Retirement Security Coalition (ARSC)**. Those other organizations represent public employees from other facets of government that contribute to ASRS. Knowing from past experience that **there is strength in numbers** and **collaboration works best we have spent some money and much time to push the agenda of ARSC**.

Our message is simple – ASRS is one of the best public pension systems in the country. Research shows that

proposed changes would be to the detriment of not just the system, but the employees who adopt alternative contribution strategies. In the long run, those changes could have dramatic effects on Arizona's overall economy.

Our most recent area of concern is the same that led to the founding of an organization. There are those that want to change the Arizona State Retirement System.

Under the guise of providing "choice" to new enrollees, certain individuals want to change the system for public employees' enrollment in ASRS. **As with education, the introduction of "choice" is a euphemism for privatization and profit taking from pension funds.**

So far our efforts have been successful. No bills have been introduced in this legislative session to make substantive changes to ASRS. ARSC has held two events at the Capitol to educate legislators about ASRS. Working in collaboration with ARSC, Paul Matson, Executive Director of ASRS, has talked with many individuals and several groups in an effort to inform them of the efficacy of the current system.

That doesn't mean we are out of the woods. Until the legislature adjourns nothing is safe. And there are those that say any substantive changes will be proposed in the next legislative session in 2020 when "choice" advocates are better organized.

The message I have for you is clear. **AASRA is here to work on your behalf at the state level.** The officers of our organization come from Kingman and Globe, Safford and Yuma, Phoenix and Tucson. Your local unit has the interests of your community in mind, **but we all share many common concerns at the state level.**

Encourage your friends to join AASRA to support the work that we do locally and at the state level.

Thank you for your support!

Jerry Holmes, AASRA President

ARIZONA RETIREMENT SECURITY COALITION

The Arizona Retirement Security Coalition (ARSC) was organized last fall to defend our ASRS defined benefit pension against attacks from special interest groups. **Our goal is to ensure that all Arizona voters hear the facts, not the propaganda, about defined benefit (DB)**

pensions vs. defined contribution (DC), 401k-style retirement plans.

WHO IS ARSC?

We are a group of educators, public employees and retirees who are concerned that out-of-state special interest groups have targeted our defined benefit pension system. We include:

AARA - Arizona Alliance for Retired Americans

AASRA - All Arizona School Retirees Association

ACEP - Arizona Center for Economic Progress

AEA - Arizona Education Association

AEA-R - Arizona Education Association-Retired

AFL-CIO - American Federation of Labor — Congress of Industrial Organizations

AFSCME - American Federation of State, County and Municipal Employees

MCCFA - Maricopa Community Colleges Faculty Association

WHO IS ATTACKING OUR PENSIONS?

The Arnold Foundation - has spent at least \$10 million since 2008 to attack public pensions across the country and reduce pension benefits for public workers

The Reason Foundation - is committed to privatizing public services and supports legislation to "reform" the ASRS to reduce the cost to taxpayers and government

Americans for Prosperity (Koch brothers) - announced their support for legislation to convert the ASRS DB pension to a DC retirement plan

Arizona Chamber of Commerce - announced that "reform" of the ASRS defined benefit pension system would be their top priority for the 2019 legislative session

WHAT DO THEY WANT TO DO?

- ◆ Steer future employees away from ASRS (DB) pension into a 401(k) style (DC) plan
- ◆ Collect higher management fees and commissions on your retirement savings
- ◆ Capitalize on the \$40 billion in our pension trust fund to increase their profits
- ◆ Privatize public pensions
- ◆ Eventually shut down the ASRS to new enrollees, raising the cost of our defined benefit plan atomically and possibly forcing a reduction in benefits

WHAT CAN WE DO TO PREVENT THIS?

Don't apologize for your pension!
It isn't a "gift"! You earned it!

Tell everyone you know the facts:

- ◆ ASRS is the premier public employee pension plan in Arizona and one of the top rated plans in the nation.
- ◆ Defined benefit pensions last for your lifetime and provide financial security.
- ◆ Defined benefit pensions help attract and retain employees in public service jobs.
- ◆ 401(k) plans have higher administrative costs, higher risks and lower returns.
- ◆ Defined contribution plans are a bad choice for taxpayers as well as public employees.
- ◆ Retirees on defined contribution plans can run out of retirement savings and become solely dependent on Social Security and government welfare.

Everybody's help is needed to protect our ASRS pension and other defined benefit pensions.

Joe Carter, Legislative Team Chair

Around the State

In March, **Pima County** had Carolyn Campbell, Executive Director of the Coalition of Preserving the Sonoran Desert, talk about preserving desert habitat for animals and the land bridges that have been built for them to cross busy roads safely. Brent Dennis, Tucson Parks and Recreation Director, talked about revitalizing Tucson Parks and about planting trees.

Westside Unit has had interesting and fun programs like Talking Books, Banner Poison Control, estate planning, and AIRS refugee services. They are learning how to be more prepared for emergencies.



East Valley members: Doug Honaker, Debbie Engelsman, Mary Joy Haly, Lorri Nelson, Bob Baxter, Sherry Sharp, Debbie Duncan and Jean Mills (not pictured). They bagged 5030 lb. of beans. 1000 EFBs and \$1 equals 5 free meals.

Pinal Unit had a plant and flora company show how various containers could be arranged and planted.

Kingman Area Unit has a program given by Keepers of the Wild near Valentine, AZ. This group is dedicated to the protection of abused, neglected, abandoned and retired captive wildlife.

Frieda Baker was honored for her dedicated teaching career and her community activism through the years at **Pima County's** April meeting. Pima County honors a member each April.

Huachuca Unit's guest speaker was retired Bureau of Land Management Hydrologist Ben Lomeli, who gave an informative presentation with slides on the topic of "Hydrogeological Evolution of the San Pedro Valley."



Betty Richter & Ben Lomeli

Westside has a new trifold for prospective members. We are updating our membership list, have our own AASRA Westside Facebook group, email and twitter accounts. We are trying to inform current and future members in a variety of ways.

Mary Henderson, Saguaro Unit, was appointed to complete the term of **Jim Grosbach**, District VP-3A (Phoenix-Scottsdale & Saguaro units). Jim had been an active member of the State Board for many years. Enjoy your retirement from the board.

Lin Sue Cooney of Hospice of the Valley explained many of the services of HOV to the **Northwest Unit**.

East Valley Unit had an undies shower for homeless men with I-Help in April. Earlier they collected feminine hygiene products for homeless women.

Ted Forte gave a very informative presentation about the "OSIRIS REX: NASA's asteroid sample return mission" and its connection to University of Arizona to the **Huachuca Unit**.

AASRA has the capability to email all our members at once with email server, Mail Chimp. **Terry Bagwell** and **Steve Poe** have shared the task of inputting the email addresses. Thank you for this time consuming task.

It Happened from an Invite!!

On April 4th, Arizona Superintendent of Public Instruction Kathy Hoffman visited Moon Mountain Elementary School in Phoenix. She enjoyed touring the school, meeting many of the teachers and staff, and observing a lesson in a first grade class. AASRA Northwest member Barb Weber met Supt. Hoffman at our Legislative Awareness Day in February and extended the invitation that led to Hoffman's visit to the school where Barb volunteers every week. Thanks, Barb for inviting, planting a seed and causing this to happen. Super!



Chris McGraw, Kathy Hoffman & Barb Weber

AASRA LEGISLATIVE DAY 2019

On February 13th approximately 35 AASRA and DKG members met at the State Capitol to listen to a wide variety of speakers. Our **keynote speakers** were **Superintendent of Public Instruction Kathy Hoffman** and **Secretary of State Katie Hobbs**. Both ladies spoke about the importance of additional, dedicated funding for public education and the ongoing need for more teachers in our schools.

We also listened to **Reps. Charlene Fernandez** and **Gerae Peten** from Legislative District 4. They spoke about education, opportunities for women and their experiences in the Legislature. **John Moody**, AASRA legislative consultant, **Stephanie Parra**, AEA lobbyist and **Daniella Smith**, ARSC coordinator spoke to us about proposed legislation affecting education, teachers and healthcare. They discussed the climate



and politics at the Legislature and **warned us of possible threats to our defined benefit pensions**. (Be sure to read the accompanying article on the ARSC.)

After lunch on our own, our group was introduced in the House by Rep. Peten and in the Senate by Sen. Carter at the beginning of the afternoon floor sessions. Some of our members concluded the day by attending House or Senate committee meetings.

If you haven't yet attended a Legislative Awareness Day, **please treat yourself to an informative, eye opening day at the Capitol next year**. We haven't set the date yet. Watch this newsletter and check your email for information later this year.

Joe Carter, Legislative Team Chair

AASRA Legislator of the Year

Michelle Udall was recommended by the Legislative Team and the Board approved recommendation for **AASRA 2019 Legislator of the Year**. She represents Legislative District 25. Her district is in southeastern Maricopa County, including more of the city of Mesa. She has served in the



House since 2017. Prior to being in the House, she was a member of the Mesa School Board. Representative Udall is the **chairman of the Education Committee** and serves on the Appropriations, Natural Resources and Energy & Water committees. Udall stated her **most important bills** this session were: HB2183: memorial; **Frances Munds; women suffrage**, HB2184: **English language learners**; instruction; budgeting (as SB1014 was signed by the Governor 2/14/19), HB2303: **computer science**; credit; mathematics; science and HCR2032: **holocaust education**; support; schools.



is proud to partner with AASRA to provide you a number of helpful benefits. To find out more, visit www.myAMBAbenefits.info/aasra or call 800-258-7041



AASRA
7250 North 16th Street, Suite 302
Phoenix, AZ 85020-5279
Return Service Requested

PRSR STD
U.S. POSTAGE
PAID
PHOENIX, AZ
PERMIT #5514

Hydrate & Relieve Stress

With summer approaching and temperatures rising, it's especially **important to keep hydrated**. Dehydration can lead to a multitude of health concerns including headaches, brain fog, and irritability. If you feel thirsty, that is a sign you are already dehydrated. **Be sure to drink a glass of water as soon as you get up in the morning and continue throughout the day.**



Stress is an everyday aspect of our lives as we tackle caregiving, caring for our own health, and other daily stressors. **While we can't completely do away with stress, we can help manage it.** Doing something you enjoy, even for just a brief time during the day, can help you relax. **Find an activity you enjoy**, whether it's gardening, crafting, reading, or doing crossword puzzles. **Keeping a positive attitude and laughing can do wonders as well.** So sit back and watch an old sitcom or movie and take care of yourself...you're worth it!



Barbara Weber, Health & Wellness Chair

**Don't forget to register for the Convention on
June 5-6, 2018**

- **Connect with members from across the state.**
- **Inspiration from amazing speakers**
- **Information about your pension**
- **Gather ideas you can take back to your unit**
- **Support for AASRA Scholarship Foundation with drawings for unit donated baskets.**

AASRA Scholarship Foundation

The ASRA Scholarship Foundation Board continues to be active. The **state universities**, ASU, NAU, UofA, have been **contacted for submissions of candidates** for this year's scholarships, which will be coming within the next few weeks. The scholarships awarded this year will be for \$2,000.



Donations have been coming in slowly with small amounts. Every donation is important. Those, who have made contributions to the Scholarship Foundation, are **assisting deserving education students in finishing their degree requirements.** **Consider making your own contribution to assist education students preparing to teach in our Arizona schools.** Thanks much for your thoughtful attention to assisting our future teachers.

A new member **Mary Rogers** has volunteered to serve on this committee. **Alice Reule** is returning to the Scholarship Foundation. **Marge Threewit** continues to keep the Foundation's finances in order. **Joanna Haspels** continues to send letters of thanks to donors and to recipients, honoring and/or memorializing friends, family members, and former Board members.

Joanna Haspels, Foundation Executive Secretary



The AASRA Newsletter is published three times a year. AASRA, 7250 North 16th Street Suite 302, Phoenix, AZ 85020-5279. President-Jerry Holmes, Interim President-elect -Joanna Haspels, Secretary-Pearl Nancarrow ,Treasurer-Sue Secrest, Co- Executive Directors- Janet Fee & Kristi Koziol, Newsletter Editor-AnnJi Craig-Wooten.

www.aasra.org

Facebook – All Arizona School Retirees Association