



# AASRA Newsletter

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

Winter 2018

Volume 56 No. 1

## Legislative Day – February 14

### AASRA Legislative Day 2017



On **Wednesday, February 14**, your AASRA Legislative Team will be guiding you through AASRA Legislative Day for the fourth year.

- **Encourage you to make appointments with your legislators for Legislative Day before the 14th**, so you can meet with them to discuss our concerns
- **You must pass through a security checkpoint to enter the House of Representatives. The less you bring the easier and quicker it will be to enter.**
- **8:45 a.m. sharp, meet at the bell in front of the Capitol**
- **Wear your AASRA red shirts or other red shirts**

#### Activities: (Tentative)

- Legislative Consultant update by John Moody
- Group introduction, from the floor of the chamber by a state Representative or Senator
- Register at the kiosks at the House and Senate (Once you're registered at the Capitol, you can send emails from your home commenting on different bills.)
- Visit any committees or caucuses if meeting that day
- Lunch on your own. The cafeteria in the basement of the House takes cash or credit card.
- Listen to Legislators address our group in the old Senate chambers in the Capitol Museum (Schedule TBA)
- Meet with your legislators

Materials will be sent to every unit president and all members of the AASRA State Board, telling you *how to contact your legislators* in this packet and in this newsletter. The packet will also have *maps of the Capitol with the parking areas*, a *list of AASRA Legislative Priorities*, and *talking points on those priorities that you can use when contacting your legislators*. Included also will be *lists of all the senators and state representatives with their phone numbers and emails*.

If you don't have an AASRA shirt, call AASRA member Mary Rogers at 623-979-3491. She can order one for you. The shirts cost \$10.

**Looking forward to seeing you at the Capitol**

### Our Partnership with DKG Continues

Since our partnership with Delta Kappa Gamma was so successful last year, both organizations chose to continue working together this year. On February 14<sup>th</sup>, be sure to look for many DKG members as well as AASRA members at the Capitol.

**Suellen Brahs**, DKG leader and AASRA unit President, and Joe Carter are working to secure legislators and other knowledgeable speakers to address our group in the old Senate chambers in the Capitol Museum. Please check your packets and look for any updates on February 14<sup>th</sup>.

## How to Contact Your Legislators

If you want to know who your State Legislators are and how to contact them, do the following:

**Via the Internet:** The AZ Legislative website is new and much easier to use! Follow the directions below and the prompts on the website pages.

1. Go to the website of the State Legislature at [www.azleg.gov](http://www.azleg.gov).
2. At the bottom of the Homepage, click on "Frequently Asked Questions" OR in the color section on the Homepage, click on the word "Members" and follow the prompts.
3. Click on "How can I determine my district and legislator?" and follow the prompts. After entering your complete address, the screen will show your Congressional and Legislative Districts. Be sure to write down these numbers!
4. If you already know your legislator's name, click on "Members", then click on "Member Roster". From this page you can click on either House or Senate Roster.
5. From these roster pages, you can email any Legislator by clicking on their name in the "Email" column. (Ex. "Email: SALLEN" to email Sen. Sylvia Allen)

### **For those who do not use the Internet:**

You will need to **know your legislators' names**.

#### **1. To call:**

Senate info desk – (602) 926-3559  
House info desk – (602) 926-4221  
Outside the Phoenix metro area:  
1-800-352-8404

You can also find each Legislator's office number in the last column on the roster page. Be sure to add the 602 area code when calling. Their assistant will probably answer.

#### **2. To write: the Legislator's Name**

Arizona State Senate or  
Arizona House of Representatives  
Capitol Complex  
1700 W. Washington  
Phoenix, AZ 85007

## You Can Lobby from Home



For those of you that cannot come to the Capitol on Legislative Day, you can contact your legislators' offices a few days before February 14 or on February 14. **If you call**, you'll be speaking with their secretaries. **If you email**, you are more likely to reach your legislator directly. Identify you are one of their constituents, and tell them what your concerns are (use the talking points).

**Our main priority is keeping our Defined Benefit pensions.** Stress that the ASRS is a sound pension, is well funded and managed. **Another of our main priorities is adequate funding for public education.**

If you have any questions, please do not hesitate to call Joe Carter, the Chair of our Legislative Team, at (602) 206-2899, or email him at: [jl.carter@yahoo.com](mailto:jl.carter@yahoo.com). We hope you'll all come on February 14, and that our day will be as successful as it was last year.

## Legislative Talking Points

### **1. Pension**

- ◆ ASRS is one of the healthiest, most responsibly managed public pension funds in the country.
- ◆ ASRS, as a Defined Benefit pension, provides economic security and financial stability for approximately 130,000 retirees and 207,000 active members.
- ◆ ASRS members and employers equally share the funding costs of the Trust. Members of the other public pensions do not.
- ◆ Support any ASRS sponsored legislation which would hold government entities financially responsible for the liability created if they choose to withdraw from ASRS.

### **2. Education Funding**

- ◆ Do not support expansion of vouchers and Empowerment Scholarship Accounts. These measures siphon much needed money away from public schools into private schools.

- ◆ Proposition 123 is a start towards restoring recent cuts to public education, but the Legislature needs to take the next step to permanently and adequately fund public education now and in the future.

### **AASRA Legislative Priorities 2017-2018**

The Legislative Team submitted the following legislative priorities to the AASRA State Board and they were approved on Monday, October 2, 2017. Current team members are Joe Carter, Jerry Holmes, Janet Fee and Don Ritchie.

1. Protect the defined benefit pension plan and work to strengthen and improve the Arizona State Retirement System. Monitor legislative or other efforts to weaken the ASRS or other public pension systems.
2. Support anti-voucher legislation and initiatives. Work to maintain and increase funding for public education.
3. Work for issues that will improve the integrity and image of public education, including K-12, community colleges and public universities.
4. Support legislation/initiatives that increase the oversight and transparency of funding for charter schools and Empowerment Scholarship Accounts, and limits the expansion of ESA's.
5. Work against any TABOR type legislation that may be introduced. (TABOR stands for Taxpayer's Bill of Rights)
6. Work against any legislation that promotes excessive interest rates on consumer loans, such as payday and title loans.
7. Promote restoration and budget increases for human services such as caregiving funds and social services for children, seniors and families.

### **AASRA Goals for 2017 – 2018**

- Advocate for ASRS and our defined benefit pension plan, healthcare accessibility and long-term disability for the benefit of current and future retirees
- Promote widespread awareness of AASRA in an effort to expand influence and increase membership
- Support legislation and initiatives that are beneficial to public education and public school employees, that require accountability of all schools and stipulate certified teachers in every classroom
- Provide information to prepare AASRA members and potential members for retirement
- Furnish opportunities and connections for community involvement by members

These goals came from a collaboration using our AASRA Purposes plus group and individual thoughts at the October Board meeting and later through emails. These goals were approved at the November 27, 2017 Board meeting.

### **Help Prioritize Your Goals**

When you start wondering what you should do next focus on these three ideas:

- Determine what is your top priority. Which goal is the closest to my ultimate WHY? When you know "why", you will be able to prioritize more effectively.
- Do what is important. Choose what will get you closer to the goal. It may not be the most urgent but the most important.
- Take action on those tasks and actions that will get your goal achieved.

*From an article by Tony Woodall*

## Jerry's Update

**This is a busy time of the year.**

Governor Ducey has given his State of the State address, the Legislature has made and heard their first speeches and the bill hopper is already full. **AASRA's leadership has been preparing for what is to come** in the next few months.



In mid-November, five of AASRA's Board members met with our legislative consultant, John Moody. John is an attorney, who provides AASRA with weekly information on what is going on at the Capitol. He makes us aware of bills introduced that affect issues about which we are interested. On occasion, John gives us suggestions as to how to affect the outcome of a bill. Each year, AASRA's Legislative Team meets with John prior to the legislative session to talk about what to expect in the coming session. **We can't afford to employ a lobbyist for the purpose of lobbying, but our relationship with John Moody helps us to stay ahead of the game.**

In early December, our Legislative Team met with Paul Matson, the Executive Director of ASRS. Paul and his team shared with us the focus of what they wish to accomplish at the Legislature in the coming session. The Legislative team asked questions to clarify issues and offered our support in the legislative process. Communication with ASRS continues. Our Executive Director, Janet Fee, monitors ASRS board meetings.

A huge THANK YOU to Joe Carter, chairperson of the Legislative Team, for the many hours spent arranging the above events and our Legislative Day. Joe is a vital member of the AASRA Board of Directors who is always thinking about how to make AASRA more effective.

Last fall I attended a three-day workshop sponsored by NRTA. Attendees from nearly all 50 states shared ideas on protecting our pensions and refining our messages. We took the opportunity to visit with Congress people and their staffs in order to advocate for issues important to us. **I met with four different Arizona Representatives and made sure they knew about our long history and those issues that we hold dear.**

In mid-November I attended a workshop on school finances presented by Ricky Hernandez, Pima County Schools CFO and State President of AASBO. I came away with a surface level understanding of the

enormous complexities of school finances and an appreciation for school business officials like Ricky Hernandez.

In early December I attended a conference in Phoenix on Defined Benefit pensions. With presenters such as Paul Matson of ASRS, Bailey Childers of the National Public Pension Coalition and Hank Kim of the National Conference of Public Employee Retirement Systems it was a great opportunity to hear about places other than Arizona. **We are fortunate to have the outstanding pension plan that ASRS operates. Also, we are quite fortunate to participate in Social Security.** There are at least 13 states where teachers do not contribute to or receive benefits from Social Security.

In addition to the above events, I have been able to attend unit meetings in other parts of the state. The Copper Center unit (Globe/Miami) is pushing for new members. Twice I have had the opportunity to talk with members and prospective members in Prescott. Thank you to the Phoenix Northwest Unit for inviting me to attend one of your group's fast paced gatherings. I'm looking forward to visiting the Phoenix Saguaro unit in early February. My apologies go to the Casa Grande unit for not making it to a meeting yet.

In an effort to appeal to younger members and better communicate with our existing members AASRA is updating our social media presence. We explored social media uses of our various units at our late November Board meeting. **Our website and Facebook pages are undergoing renovation** and we hope to soon implement some other platforms, as well. **Thank you to Terry Bagwell** from Pima County for your work on our behalf.

As I said in my first newsletter column I want to meet you and hear your thoughts about our AASRA goals and ways to achieve them. Invite me to your meetings or just contact me. **Please take the time to tell me what is on your mind** in the weeks and months ahead. My email is [cerrada68@gmail.com](mailto:cerrada68@gmail.com). I look forward to hearing from you.

*- Jerry Holmes, State President*

## Informative Resources

One of my other "jobs" is to write a column for the terrific newsletter published by the Pima County Unit of AASRA. In that column, I try to keep members abreast of what is happening in Arizona regarding education and retirement/pension issues.



The newsletter editor, **Paris Rebl**, does a great job and the newsletter has become a point of pride for the entire unit. Here is the link to the PCSRA website; just click on Newsletters heading. <http://pcsra.com>

In the course of writing the column for PCSRA I run across **some terrifically informative websites, reports, etc.** What are some of the resources you use to stay abreast of what is happening? Please send me your links at [cerrad68@gmail.com](mailto:cerrad68@gmail.com) .  
**Here are some of the links to information that I utilize.**

**Recent** report by ACLU critical of charter school admission policies  
[https://www.acluaz.org/sites/default/files/fielddocuments/schools\\_choosing\\_students\\_web.pdf](https://www.acluaz.org/sites/default/files/fielddocuments/schools_choosing_students_web.pdf)

**Arizonans** for Charter School Responsibility with many links to information on charter school practices  
<http://www.azcsa.org/about-us.html>

**Arizona** Schools Now report on why Arizona continues to lag in school funding  
<https://azschoolsnow.org/strong-schools/schools-more-than-1-billion-short-of-pre-recessionary-spending/>

**Grand** Canyon Institute – first of three reports on Charter School Funding and lack of transparency  
[http://grandcanyoninstitute.org/wp-content/uploads/2017/09/GCI-Policy-Report-Following-the-Money\\_Sept\\_17\\_2017.pdf](http://grandcanyoninstitute.org/wp-content/uploads/2017/09/GCI-Policy-Report-Following-the-Money_Sept_17_2017.pdf)

**ASRS** website – legislation affecting ASRS  
<https://www.azasrs.gov/content/legislation>

**Arizona** Republic report on who utilizes school vouchers  
<https://www.azcentral.com/story/news/politics/arizona-education/2017/03/30/arizona-taxpayer-funded-vouchers-benefiting-students-more-affluent-areas/99707518/>

**National** Retired Teachers Association  
<https://www.aarp.org/about-aarp/nrta/>

**National** Institute on Retirement Security – research on the effects of Defined Benefit pensions  
<https://www.nirsonline.org/>

**The** Arizona Legislature <https://www.azleg.gov/>  
**Congressional** Research Service – lengthy report on connection between income and longevity – supplied by Paul Matson <https://fas.org/sgp/crs/misc/R44846.pdf>

**Joint** Legislative Budget Committee - Fiscal Policy Analysis for the Arizona Legislature  
<https://www.azleg.gov/jlbc.htm>

*Jerry Holmes – AASRA President*

## Scholarship Foundation News

Your Scholarship Foundation needs YOU!

Donations for the 2017 year have been smaller than expected; therefore you are encouraged to donate to this worthy cause of assisting future teachers in Arizona as they complete their educational requirements.

You can donate in honor of someone; in memory of someone; or generally for future teachers in our State.

The Scholarship Committee would like to be able to match last year's donations to worthy students needing that extra boost for finishing their credential requirements. Last year's donations were a total of \$2500.00 to each student in each of the three Arizona Universities.

**Let's make this year's contributions as great as or greater than the previous year.**

Thanks to each of you kindly for your generosity!

*Joanna Haspels, Executive Secretary  
AASRA Scholarship Foundation*

## ASRS News

**Good news!** The ASRS total fund earned 13.9% for the fiscal year of 2017.

At the December 2<sup>nd</sup> ASRS Board meeting, the ASRS fiscal report dated June 30, 2017 was presented using changes, adopted at the October Board meeting. The main changes were:

1. Moving the nominal investment return assumption from 8.0% to 7.5% for the fund.
2. Change specific mortality table which had generational improvements (people who have a defined pension and health care live longer).
3. Beginning to fund a future PBI.

This resulted in lowering the funded status of the fund to 70.5%. It would have been 77.1%. In addition the contribution rate for active employees will be 11.80% starting July 1, 2018. This is up slightly.

**ASRS IS AN EARNED BENEFIT!**

## Around the State

The UA College of Education (COE) surprised **Marilyn Ludwig** from **Pima County** with the Sidney S. Woods Alumni Service Award for service to education in Arizona at the COE's Homecoming Wine Harvest Reception on Friday, October 27.

"Mindfulness", emphasized being aware of ourselves, our lives' as they are, our surroundings and how things affect us in our everyday world was a program for **East Valley** Unit.

**Northwest** featured Heather Carter, 2017 AASRA Legislator of the Year. Carter emphasized her views on education issues. She urged all registered voters to vote in the primaries, especially the registered independents.

**Kachina's** December potluck and auction reported, "Wow, the food was delicious, the selection of gift certificates and goodies varied and good cheer was abundant! We raised a whopping \$932.00 (our highest amount ever!) which will benefit one of our own Verde Valley students planning to go into Education next fall."



**San Pedro** donated \$50 to help fund the Cochise County Teacher of the Year. **Melinda McKinney** gave a talk on her trip to Kuala Lumpur in Malaysia where her daughter works with school development.



**President Jerry Holmes** spoke to the **Copper Center** Unit in November. The members were greatly impressed with his presentation.

*Jerry with **Emelie Plunkett**, Copper Center President*

**East Valley** members had fun dressing up for the season. Doris Cornett showed up in a flight suit her faculty designed for her hot air balloon ride. Cowgirl Jean Mills and Barbara Griffor admire a lively "cat".



This fall at the "Walkin' on Main" celebration in Old Town Cottonwood **Sue Davis (Kachina)** showed and sold some of her paintings.

**Kingman Area** held its Annual Ditch Day at Upton's Hidden Pines B&B. The theme was "A Luau Party". Members arrived in their best Hawaiian attire. Prizes were given for the best dressed.

The **PCSRA** Board Members have pledged to match every dollar donated to the PCSRA Scholarship Fund during the January Luncheon. These personal pledges will provide the opportunity for it to reach its \$2,000 goal and get a head start on collecting money to fund next year's scholarship.

The **Northwest** November meeting's program was on World War II Veteran's Honor Tour to Washington, DC. After that slide show, members each honored a family member who served in any of our armed forces.

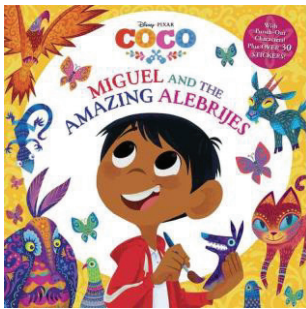


*Suzie Baugh, Marge Threewit, Peggy & Bill Aiton*

**Westside's** November meeting featured **Linda Danielson** on "Gardening in Phoenix". She discussed how to plant, maintain, enjoy plants in our climate and handed out a November planting guide.

**Keep sending in Unit details and photos.**

**Huachuca** Unit in December was treated to a musical performance of a Christmas Play by the children of the United Methodist Church preschool. Members contributed paper products, cleaning supplies and cash gifts for the Good Neighbor Alliance. Members also contributed games, toys, stuffed animals, art supplies, etc. for the children at the Forgasch House shelter.



Congratulations to author and **Pima County** member **Roni Rivera-Ashford** for her book "Miguel and the Amazing Alebrijes," which was the inspiration for Walt Disney's animated film "Coco." Roni and her son, Aaron, a U of A and American Film Institute graduate, attended the recent premiere of "Coco" at Hollywood's El Capitan Theatre.

Westside members, Margery Webb and Mary Strebe serenaded Garry York with Christmas carols and gave him a Santa hat. Health reasons caused Garry to miss several meetings. What a nice surprise!



**East Valley** winners of four winter scholarship raffle baskets included long-time members **Elinor Reifschneider** (pictured) and **Duane and Virginia Whitfield** along with friends Pat Clark and Sue Watts prospective Unit members. The names were

drawn at the annual December Tea held at the Hackett house in downtown Tempe. The scholarship committee had a very successful fund raising drive that helped fill the coffers for either one or two scholarships to be given to ASU education students.

The Casa Grande librarian spoke to the **Pinal County** Unit in October. In December they met at a member's beautifully decorated home.

## NEW Member Benefit

### myAMBAdiscounts.com

## For AASRA Members A

Find thousands of online and local discounts when you register at:  
**myAMBAdiscounts.com**


myAMBAdiscounts.com gives your AASRA membership even more value. Find savings on everything from dining, cars, clothes, entertainment, travel, movie tickets and many other valuable discounts that **SAVE** you money!

**To activate your new myAMBAdiscounts membership, follow these 3 easy steps!**

- 1.** Go to [myAMBAdiscounts.com](http://myAMBAdiscounts.com) and enter your email.
- 2.** Enter activation code - **ambasavers**
- 3.** Register your basic information and sign-up for email alerts.

Enroll today and start saving!

Benefits made available through



# AMBA

ASSOCIATION MEMBER BENEFITS ADVISORS





# AASRA Newsletter

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## REASONS TO ATTEND THE AASRA STATE CONVENTION



June 5 & 6, 2018

1. Be part of the conversation about the future of AASRA!
2. Gather ideas you can take back to your Unit.
3. Be inspired by speakers and the breakout sessions.
4. Connect with members from across the state.
5. Celebrate AASRA: Keys to Success.
6. Entertainment James Hughes Singer.
7. New Informational tables.
8. Outstanding Raffle Baskets from the various units throughout the state.

**Four Points Sheraton**  
**2532 W. Peoria Avenue**  
**Phoenix, AZ 85029**

**Early Bird** Registration \$65 by April 5, 2018

**Late Registration \$75 after April 5, 2018**

Hotel Room still only \$79 per night  
Insert is the Convention Registration sheet.

Units don't forget to plan your Raffle Baskets to support the AASRA Scholarship Foundation.

## AASRA Awards

Units don't forget to get in your nominations for:

**Outreach Award** – gives recognition to an individual who promotes educational and charitable projects in the community.

**Meritorious Award** – gives recognition to an individual who promotes and strengthens the status and advancement of AASRA.

**Unit of Distinction** – A Unit checks off on 21 items that it has accomplished during the year. All units should do this. Forms for these awards can be found on [www.aasra.org](http://www.aasra.org). Just click on awards forms for 2015 – the forms are still the same. Before you print it, you may need to reduce the size to fit on a sheet of paper.

Be sure all nomination forms reach the office by

**April 1, 2018.**

Please send your information and photos about your Unit and members to: [azredsunset@cablone.net](mailto:azredsunset@cablone.net).

**Deadline April 6 for the Spring Issue**

Send in an email or attach as a Word or PDF document and photos in JPG format.

**Do it as it happens!**



The AASRA Newsletter is published three times a year. AASRA, 16165 N. 83rd Avenue Suite 201, Peoria, AZ 85382-5816. President- Jerry Holmes, Secretary- Pearl Nancarrow, Treasurer-Sue Secrest, Co- Executive Directors-Janet Fee & Garry York, Newsletter Editor-AnnJi Craig-Wooten. **[www.aasra.org](http://www.aasra.org)**

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