



AASRA NEWSLETTER

Affiliated with NRTA, a division of AARP
Fall, 2022

Mary Henderson, AASRA President



Let me introduce myself.

Personally: I'm originally born and raised as a Midwest farmer's daughter, middle child of 5. My family moved to Arizona in 1985 and I started working for the Avondale Elementary School District as a para-

pro. With the encouragement of the classroom teachers at my school I returned to Ottawa University parttime to finish my B.A. in '91 and started teaching 4th grade that fall in the Avondale district which was my favorite grade level to teach. I did teach 2nd, 3rd and one year of 3/4. I retired from the classroom in 2011 to be more available to take my husband to his V.A. medical appointments until he passed in 2015. I continued to substitute for the district until 2017 when I chose to retire.

My family consists of my daughter, who teaches 3rd grade at Ft. Jackson, South Carolina (Department of Defense School) with a granddaughter and grandson who both work at a veterinary clinic plus my granddaughter and grandson-in-law (Air Force) who just presented me with my first great-grandson the end of August who are stationed in Oklahoma City; my son and daughter-in-law live in Orange, California with 2 grandsons (14 and 8); plus my exchange student daughter and her family who live in Finland (bucket list travel) and exchange student daughter and her family

who live in Japan (have made the trip there but would love to go again).

My background in AASRA: My local unit is the Saguro Unit in the far west valley. After joining and participating locally I became unit president for several years and was encouraged by Jim Grosbach to replace him on the Executive Board as the 3A Vice President. I was also encouraged by Sue Secret, past state treasurer. From 3A VP last year I was asked to be President-elect. And as they say the rest is history.

I enjoy traveling and I'm sure some people feel I don't stay home at all (especially my 2 chihuahuas). This past summer I was in Hawaii, California, Iowa, Oklahoma, and South Carolina plus local Arizona travel. I loved every minute of it. I would love to visit with your unit too; just invite me, and no, I don't have to speak.

Thank you to the Units who have included me on their newsletters and/or their minutes thus far this year. My email is: testweight@g.com. Please make sure to include State Historian, Sandy Marshall on your minutes. Sandy's email is: azsandy123@cox.net.

AASRA Has Been Busy

Our officers, units and members have been busy. Many of the units are having in person meetings again. Our state board has Zoom meetings since we are scattered around the state. The AARP Arizona office is not open yet for use by others per AARP policy. The newsletter will relate some of the activities and work that has happened or is happening.

Protecting Our Pensions in 2022

The Arizona Retirement Security Coalition (ARSC) is comprised of nine core partners, including All Arizona School Retirees Association (AASRA), Arizona Education Association (AEA), AEA-Retired, and other labor and community organizations. During the 2022 legislative session, the Coalition and our lobbyist, Daniella Smith, successfully defeated two bills that threatened the stability and fiscal health of the Arizona State Retirement System (ASRS).

SB1145 ABOR; OPTIONAL RETIREMENT PROGRAMS - sponsored by Senator Warren Petersen.

This bill would have allowed the three public universities to opt out of the ASRS by offering their optional retirement program (ORP) to all new employees in lieu of the ASRS plan. The universities claimed this legislation was intended to provide new employees more choices for retirement planning, but that was misleading. The bill's purpose was to save the universities money by shifting most of the investment risks and fees from the employers to their new, lower income employees. If passed, the ASRS estimated that this legislation could cost the system approximately \$675 million dollars over the next 20 years.

As soon as the bill was assigned to the Senate Finance committee, Coalition partners contacted stakeholders and other legislators, asking them to oppose it. We asked our partners to encourage their members to contact Sen. David Livingston, chair of the committee, and request that he not schedule this bill for a hearing.

With help from the National Public Pension Coalition (NPPC), we also sent digital messages to stakeholder groups, Coalition partner members, and other interested parties asking them to contact Sen. Livingston and request that he not hear the bill. Our efforts paid off because he did not schedule the bill for a hearing, thus killing it.

HB2637 DIVESTMENT; K-12; ABORTION; EXPLICIT MATERIAL - sponsored by Rep. Jake Hoffman.

This bill would have required the State Board of Investment (SBOI), the Arizona State Retirement System (ASRS) Board and the Public Safety Personnel Retirement System (PSPRS) Board to adopt a policy for identifying and divesting from companies that donate to or invest in organizations that promote, facilitate or advocate for abortions for minors, and companies that donate to or invest in organizations that promote, facilitate or advocate for the inclusion of, or the referral of students to "sexually explicit materials" in K-12 education.

Problems with this bill:

- The definitions of sexually explicit materials and advocacy for abortion were extremely broad and vague and would have forced the ASRS, PSPRS and SBOI to divest from major companies such as Amazon.
- The ASRS Board's primary responsibility **and fiduciary duty** is to maximize investment returns of the \$50 billion dollar trust fund under their control. This is achieved by making long-term investment decisions that generate the highest returns. If ASRS investment managers must constantly restructure, reevaluate and rebalance investment portfolios based on political or social agendas, investment fees would most likely increase, rates of return would decrease, and contribution rates would go up.
- The definition of "sexually explicit materials" was so broad it would have required divestment from profitable companies that provide materials found in current, school board approved sex education programs across the country. It could have forced the ASRS to divest from companies that publish or provide books and materials found in high school English classes or magazines currently in school libraries, such as *The National Geographic*.

➤ Between the likelihood of contribution rates increasing, investment returns decreasing and the administrative nightmare this would create, HB2637 was a recipe for disaster!

We did a **lot of work** on this bill, both openly and behind the scenes, because other stakeholders chose not to take a position due to the controversial political issues involved. Fortunately, we were able to get the pension systems removed from the legislation. Ultimately, it was not heard in the Senate. Then a strike-everything amendment was added, effectively killing the original bill.

From where we began, with no other stakeholder groups willing to take a stand against the bill, to successfully stopping it, was a HUGE victory!



This is a short summary of the critically important work that the Arizona Retirement Security Coalition has been

doing for the last five years on behalf of public employees, our defined benefit pension system and public sector retirees in Arizona.

Joe Carter, AASRA Legislative Liaison & Daniella Smith, ARSC lobbyist

Stop Universal Vouchers!

A Short Background

On June 24th the Arizona Legislature passed House Bill 2853, sponsored by Representative Ben Toma (R-LD22). This legislation removed all qualifiers and limitations for receiving a private school voucher of almost \$7,000 dollars per year. Every school age child in Arizona (more than 1.1 million) would be eligible to receive this money!

The bill passed along party lines; it received just enough YES votes in each chamber to pass. The bill also appropriated \$2.2 million dollars from the General Fund to pay for the largest private school voucher expansion in the country. On July 7th, Governor Ducey signed it into law.

The grassroots pro public education group *Save Our School Arizona (SOS AZ)* immediately began circulating petitions to put a referendum on the November 2024 ballot which would, if approved, strike down the new law. If SOS AZ is able to gather at least 118,823 valid signatures before September 24, 2022, the law will be put on hold until the 2024 general election.

In 2017 this same group, then newly formed, did the seemingly impossible. They gathered over 100,000 signatures during the sweltering summer months and put Proposition 305 on the 2018 general election ballot. Arizona voters overwhelmingly rejected that voucher expansion effort, 65% to 35%. We are confident they will do so again!

Where We Are Today

One of AASRA's goals in our Constitution is to support public education. This is also reflected in our Legislative Priorities as adopted by the Board of Directors each year.

Acting on this is imperative, Joe Carter, AASRA Legislative Liaison and Terry Bagwell, AASRA Communications Chair, supported SOS AZ's efforts by publishing progress reports and updates on the petition drive throughout the summer months. We invited speakers from this group to address our members and gather signatures at unit meetings held in September. We encouraged our members to become involved with the petition drive and support SOS AZ through their donations



On September 26th, various local outlets reported that the STOP UNIVERSAL VOUCHERS! petition drive had fallen short of the 118,823 signatures needed to place the measure on the ballot.

This was very disheartening news. We do not want others to privatize the most accessible and inclusive public education system in the world today!

Joe Carter, AASRA Legislative Liaison



& AASRA

As I hope you know, the All Arizona School Retirees Association (AASRA) might not be here except for the efforts of Dr. Ethel Percy Andrus. Dr. Andrus, the retired first woman high school principal in California, helped southern Arizona retired educators in 1950 to establish a group that advocated for increasing pensions for retired teachers. Within a few years, once again with help from Dr. Andrus, the statewide organization that is today called AASRA was founded.

Dr. Andrus also founded the National Retired Teachers Association (NRTA) and the American Association of Retired Persons (AARP). **AASRA's lifelong affiliation with both NRTA and AARP is natural and mutually beneficial. That affiliation continues today in various forms, but the most obvious is that AASRA has a position on the Advocacy Steering Board of AARP Arizona.**

I have had the good fortune to serve in the position of AASRA Liaison to AARP Arizona for the last two years. In that role, I have input to AARP Arizona on their advocacy for the aging in our state and country. Also, I have the opportunity to keep other Advocacy Board members apprised of issues affecting retired school employees. In addition, I have the duty to keep AASRA members informed about which issues AARP & AARP Arizona are currently advocating.

During the last two years, AARP's primary focus has been on reducing medical costs for seniors, specifically those enrolled in Medicare. Most of that advocacy has been aimed at the US Congress. AARP Arizona's Executive Director, Dana Kennedy, has testified before Congress on behalf of the many that are adversely affected by high medical and prescription costs. As I'm sure you know, with the passage of the Inflation Reduction Act some of those goals have been accomplished.

Other issues that AARP Arizona has worked on include long-term care and facility access for family members and public health officials, housing for the unhoused, public transportation availability for the aging, utility costs, COVID-19 as a public health issue, and livable wages.

I will keep the AASRA Board informed of AARP foci at each meeting (and maybe in between, as well) and I will be sure to keep you informed with each newsletter. In the meantime, I encourage you to follow AARP on your preferred social media or regularly check their website at <https://states.aarp.org/arizona/>

Jerry Holmes, AARP Arizona Liaison & AASRA Past President

AASRA Scholarship Recipients

ASU Dean and Professor Carole Basile wrote, "Thank you for helping us create knowledge, mobilize people and take action to improve education." **Awardee Lexus Allen**, wrote that when she graduates, she plans to return to the Navajo Reservation. "I hope to inspire my students to achieve their ambitions just as much as you helped me."

Professor and Dean Ramona Mellott from NAU shared, "The future of education is bright, and our students are even more prepared thanks to your kindness and generosity." Recipient **Anacina Barry** plans to return home to Cove, Arizona. "I strongly believe that it was my calling to return to my old elementary school to become the teacher I wish I had, while attending school."

Erica Travassos, Director of Development & Alumni Relations, from **The University of Arizona** shared a quote from **Maia Wilenius**, an undergraduate student: "Receiving a College of Education scholarship has helped me to pursue these goals with financial stability and independence. Thank you so much for your generosity."

Thank you, AASRA members, for your generosity in providing \$2,000 to each of the three student recipients. Looking forward to 2023 and again providing the much needed funds.

Alice Reule, AASRA Scholarship Executive Secretary



AASRA Legislator of the Year Representative Jennifer Pawlik

Our All Arizona School Retirees Association has an ASRS Liaison to the State ASRS Board. Janet Fee is our ASRS Liaison. She attends most of the ASRS Board meetings. Through the years, she has been included in ASRS Health Insurance Committee and other committees. Janet's favorite phrase is: **"ASRS IS AN EARNED BENEFIT"**

The total fund is funded at \$50,221,000,000. It is 71.5% funded. Through the years you have seen higher and lower funded status. Many of the figures change as determined by a different set of standards. The ASRS is one of the top state retirement funds in the nation. We are fortunate to have such a great retirement system.

ASRS Health information:

Open enrollment is the whole month of November. Enrollment Guide books are being mailed to retirees in mid-October.

The non-Medicare medical and dental plans will have the same premiums and benefit structure as this year.

The medical benefit structure remains unchanged for both Medicare Advantage plans and monthly premiums will increase in 2023 due to a year over year reduction in the Retrospective Rate Agreement funds available for premium reduction.

The fitness program within the Medical plans will transition from SilverSneakers® to the UHC Fitness Program. The new UHC Fitness program features an expanded network of fitness centers and fitness options.

Website of ASRS: www.azasrs.gov

Thanks to Janet for her dedication to this responsibility, plus sharing current information.

Janet Fee, ASRS Liaison & editor



On May 13th Joe Carter, Legislative Team Chair and President-Elect Mary Henderson met with Rep. Jennifer Pawlik (D-LD17) to inform her that she was the 2022 recipient of the AASRA Legislator of the Year award. We invited her to accept this award at our virtual Annual Meeting on June 7th, which she graciously accepted. Subsequently, on June 14th President Henderson, Joe Carter and photographer Judy Weber met with Rep. Pawlik at the Capitol to physically present this award to her.

As a teacher, Rep. Pawlik was honored to receive this award from an organization of her colleagues. She was engaging and gracious both times we met with her. We talked at length about the needs of public schools in Arizona and the challenges faced by public school personnel on a daily basis. She continues to be a champion of public schools and the hard working people who work tirelessly on behalf of Arizona's children.



The AASRA Newsletter is published up to three times a year. AASRA, 16202 N 36th Ave, Phoenix AZ 85053-2960, President- Mary Henderson, Secretary - Joanna Haspels, Treasurer-Katie Elgar, Executive Director- Kristi Koziol, Newsletter Editor-AnnJi Craig-Wooten.

www.aasra.org

Facebook – All Arizona School Retirees Association

Twitter - @AZAASRA

Share the **POWER** of Membership!

AASRA needs your membership. Numbers matter when monitoring the state legislature, advocating for defined benefit pensions and public schools, plus fighting against attacks on our students and schools. Keep active by making education and senior issues a top priority to make life better today and for the future.

Being an automatic dues deduction (ADD) member has its advantages – you don't have to write a check each year! It is so easy to forget to mail that check. Members with an Arizona State Retirement System (ASRS) pension may sign up for ADD. Your AASRA state and local dues are divided into twelve monthly deductions. Sure makes life easier!

Your membership dues for 2023 are due by January 1, 2023 or changing from cash pay to signing up for ADD. Form on next page.



is proud to partner with AASRA to provide you a number of helpful benefits.

These benefits available through your association include:

- Cancer coverage
 - Hearing solutions
 - Life Insurance
 - Emergency air and ground evacuation
 - Deeply discounted Restaurant.com gift cards
 - Deals on electronics and other products
- ...and much, much more!

To find out more, visit
www.aasra.org or www.amba.info
or call 800-258-7041

What are the purposes of AASRA?

- To monitor and support the Arizona State Retirement System on pensions, particularly the Defined Benefit plans, health programs and long term disabilities programs.
- To promote passage of legislation beneficial to public school employees and retirees. To cooperate with other organized groups that support public education and public school employees,
- To promote continuing education, preparation for retirement, including awareness about Social Security and Medicare issues and sources of assistance³ for retirees in need in our role as an affiliate of NRTA: AARP's Educator Community.
- To promote increased awareness of AASRA in order to increase membership, expand influence and present the image of aging with dignity, independence and purpose.
- To promote group and individual involvement of AASRA members by utilizing their expertise in community service to their fellow members, active colleagues and state and local community issues and affairs.



All Arizona School Retirees Association

AASRA

Fill out this state and local membership form: **PLEASE PRINT neatly**. Date _____

Name _____

Mailing Address _____

City _____ County _____ State _____ Zip _____

Email _____ Phone _____

Birth Year _____ (50-89 Pay membership dues, 90+ free membership)

Position now or at retirement: Teacher Administrator Support Staff Other

Level at Retirement or now: K-8 High School District University/College Other

Are You an AARP Member: Yes No

AASRA Annual dues \$30 or Friends of AASRA \$18 State Dues \$ _____

Circle local unit:

KRTA (Sedona) \$15 PCSRA (Pima County) \$16 All Other Units \$10

Join: Local Unit _____ or Member-at-large (no local unit in your area) **Local Dues \$ _____**

Total Dues: State PLUS Local \$ _____

Payment Option 1: Automatic Dues Deduction (Only ASRS Retirees)

I authorize the Arizona State Retirement System (ASRS) to DEDUCT any association dues as indicated below. I understand ASRS will forward each authorized deduction to the All Arizona School Retirees Association (AASRA) office. I understand the monthly deduction will continue until I notify the Arizona State Retirement System (ASRS), in writing, to the contrary. Your dues deductions will appear on your record statement under DEDUCTIONS as: Dues.

I authorize the Arizona State Retirement System (ASRS) to deduct the following amount from my monthly pension check (**please circle one**):

Sedona \$3.75 Pima County \$3.83 Pima County Life Member \$2.50 All other units \$3.33

For Automatic Dues Deduction (ADD) ASRS requires your social security number.

My Social Security Number is (*last 4 digits only*) _____ (Privacy Protected)

Signature _____ Date _____

Payment Option 2: Personal Check

_____ I prefer to pay by check the yearly dues. **Please make all checks payable to All Arizona School Retirees Association or AASRA. Total = State dues plus local dues.**

Mail this form and check, (if applicable) to: **All Arizona School Retirees Association or AASRA, 16202 N. 36th Ave, Phoenix, AZ 85053-2960.**

Thank you for your interest and support.

Recruited by _____