



*Retired*

2020 Retired Annual Meeting  
Committee Reports  
April 24, 2020

## Governing Board

*Effective April 24, 2020*

### Officers

President, Julie Jagusch (julie.jagusch@mac.com)  
Vice President, Wes Tessman (wtessman1@gmail.com)  
Treasurer, Lynette Wayne (lwayne1021@gmail.com)  
Secretary, Sharon Kjellberg (sk3cats@gmail.com)  
Past-President, Larry Koenck (lbkoenck@q.com)

### District Directors

District	Name	Email
District 1 Director	Ed Mikulich	paloed@hotmail.com
District 1 Director	Cathy Stringfield	mcstring@live.com
District 2a Director	Wes Hanna	weshanna13@hotmail.com
District 2b Director	<b>VACANT</b>	<b>VACANT</b>
District 3 Director	Dan Larson	djwerl@aol.com
District 3 Director	Boy Toy	bb88toy@centurylink.net
District 4 Director	Judy Rohde	jrohde@isd622.org
District 4 Director	Joan Beaver	joanb455@gmail.com
District 5 Director	Myrna Doran	doranmm@comcast.net
District 5 Director	Lois Wendt	lkwshak@gmail.com
District 6a Director	<b>VACANT</b>	<b>VACANT</b>
District 6b Director	Susan Witt	witt.sd@hotmail.com
District 7 Director	Charles Hellie	cchellie@charter.net
District 7 Director	<b>VACANT</b>	<b>VACANT</b>
District 8a Director	Roberta Margo	r.margo@mchsi.com
District 8b Director	Jan Cummings	janiskummings@gmail.com
At Large Representative	Sandra Skaar	sandra.skaar@yahoo.com
At Large Representative	Walt Munsterman	wmunst1007@aol.com
At Large ESP Representative	John Lipke	jwlipke@gmail.com
At Large Higher Ed Representative	Chuck Lyons	chucklyons51@gmail.com

**Committee Chairs**

Bylaws – Walter Munsterman

Communications – Myrna Doran

Finance – Lynette Wayne

Legislative Action – Joan Beaver

Membership – Judy Rohde

Nominations and Elections – Boy and Betty Toy

Program – Lois Wendt

Statements of Principal – Sharon Kjellberg

**Education Minnesota Retired Staff:**

Shelley MacDonald, Christine Thornborrow, Stephanie Berg, and Deborah Skog

## **Education Minnesota Retired 2020 Annual Meeting President's Report President: Julie Jagusch**

Education Minnesota Retired tracks three different membership numbers:

- Retired - members who have joined through a paid membership or through continuous membership
- Pre-retired - active members who previously paid for a retired membership and will most likely receive a refund once they retire and apply for continuous membership or those who were retired and have returned to an active status
- Continuous pre-retired - members who applied and qualified for continuous membership but have not official retired or their local has not submitted an updated membership roster

As of August 31, 2019, Education Minnesota Retired had 8,182 members, including 147 pre-retired members and 205 continuous membership pre-retired.

Through the Education Minnesota Retired website, Facebook, monthly e-newsletter, *Insider*, and quarterly newsletter, *ACTION*, we effectively communicate with our members. Our website is updated frequently with an event calendar, newsletter postings, conference and meeting registration forms and more. In an effort to communicate more efficiently, Education Minnesota Retired is continuously working to enhance its database of email addresses.

There has been much activity since the last Retired Annual Meeting. Instead of a Retired Fall Conference, Education Minnesota Retired decided to have regional meetings. These began in March, 2018. Since this time last year, we have had one regional meetings in Alexandria. The meetings provided an opportunity for attendees to socialize and hear from presenters on important issues that affect our lives. The Retired regional meetings committee chose the presentations and set the agenda for these events. Sessions included a legislative update, TRA update, information about the organization and an opportunity to give feedback to the Retired Governing Board about what else they would like to see from the organization. This is in response to a member survey that indicated a desire for more membership opportunities closer to their homes. In September of 2020, we will again have a Fall Conference at Ruttger's. We continue to look for additional ways to better connect with our members.

Retired members continue to be active in the political arena and contribute to the Education Minnesota and NEA PAC. Several members of the Education Minnesota Governing Board regularly attended the meetings of the Legislative Commission on Pensions and Retirement and work with the Public Employees Pension Coalition. Many of our members are actively involved in the campaigns for the elections in the fall. It is important that we continue to elect individuals who are supportive of our issues, such as a stable pension fund, health care and public education.

The NEA-Retired Annual Meeting was held in Houston, Texas, on June 30 and July 1, 2019. Education Minnesota Retired sent 8 delegates to this meeting and to the NEA Representative Convention in July, 2019.

I want to thank the leadership of Education Minnesota, President Denise Specht, Vice President Bernie Burnham and Secretary-Treasurer Rodney Rowe for their support of our organization. Secretary-Treasurer Rodney Rowe has attended many of our functions, and now Vice-President Burnham is the liaison to the active organization and attends most of our events.

The work of all of our members who have volunteered their time, including Retired Governing Board, committee chairs and committee members, is very much appreciated. Additional thanks to all of our members who attend our functions. Without you, the members, there would be no organization.

The assistance from Education Minnesota staff, Shelley MacDonald, Christine Thornborrow, Stephanie Berg, and Deborah Skog is very valuable to the operation of Education Minnesota Retired. Their support helps our organization move forward

*Effective April 26, 2019*

**Governing Board**

President, Julie Jagusch  
Vice President, Walter Munsterman  
Secretary, Sharon Kjellberg  
Treasurer, Lynette Wayne  
Past President, Larry Koenck

**District Directors**

District 1 – Ed Mikulich  
District 1 – Cathy Stringfield  
District 2 – Wes Hanna  
District 2 – Jerry Klebs  
District 3 – Adele Munsterman  
District 3 – Boy Toy  
District 4 – Joan Beaver  
District 4 – Judy Rohde  
District 5 – Myrna Doran  
District 5 – Lois Wendt  
District 6 – John Wertz  
District 6 – Susan Witt  
District 7 – Charles Hellie  
District 7 – Wes Tessman  
District 8 – Roberta Margo  
District 8 – Jan Cummings  
At Large – Lori Nord  
At Large – Sandra Skaar

**Committee Chairs**

Bylaws – Walter Munsterman  
Communications – Myrna Doran  
Finance – Lynette Wayne  
Legislative Action – Joan Beaver  
Membership – Judy Rohde  
Nominations and Elections – Boy and Betty Toy  
Program – Lois Wendt  
Statements of Principal – Sharon Kjellberg

**Education Minnesota Retired Staff:**

Shelley MacDonald, Christine Thornborrow, Stephanie Berg, and Deborah Skog

**Education Minnesota Retired 2020 Annual Meeting  
Constitution and Bylaws Committee Report  
Chair: Walt Munsterman**

**Members of the Constitution and Bylaws committee:**

Julie Jagusch, Joan Beaver, Lynnette Wayne, Sharon Kjellberg, John Lipke, Jody Anderson, Wes Hanna, Barb Rice, and Judy Rohde  
Assisted by: Christine Thornborrow

**Committee goals:**

The committee spent some time to update the Constitution and Bylaws. The major goal was to come up with a process that would allow Education Minnesota Retired to better have more representation of its members around the state.

**Proposed changes:**

Article V—Governing Board

Section 1. Representation

B.4—The current retired member of the TRA Board if he/she is a member of Education Minnesota Retired. (Old language-The TRA Board Chair or his/her designee)

B. 5---Retired members appointed or elected to national governance positions with the AFT or NEA, and retired members appointed to Education Minnesota standing committees and the Education Minnesota PAC Board. Such members are non-voting members of the Governing Board unless they are also elected or appointed to the Governing Board in one of the voting board member categories listed A. (New language)

The draft Constitution and Bylaws will be presented at the annual meeting to be discussed and voted on whether to make the changes. The draft has been reviewed by the Board of Directors and they recommended it for approval and to be presented at the annual meeting. A special thank you to all who worked to make this happen.

# **Education Minnesota Retired 2020 Annual Meeting Communications Committee Report Chair: Myrna Doran**

## **Member of the communications committee:**

Lori Nord, Julie Jagusch, Jerry Klebs, Joan Beaver, Walt Munsterman, Sharon Kjellberg, John Lipke, Betty Mohs, Lynette Wayne and John Wertz

Assisted by: Christine Thornborrow

## **Committee responsibility**

To communicate the business, issues, and news of Education Minnesota Retired and its members.

## **Committee goals**

- To continue and improve our communication to our members
- To develop alternative methods of communication
- To work toward more electronic communications
- To reach more members

## **Vehicles for Communication**

- **Retired Newsletter ACTION:**
  - Newsletter published three times a year
  - Sent electronically to members who have provided us with their email
  - Posted on our website
  - Printed newsletters sent by US Mail to those members who request receiving the newsletter in this format
- **Education Minnesota Retired Insider**
  - Monthly electronic newsletter
  - Distributed by email the first Wednesday of every month
  - Shorter communication with limited topics per issue plus reminders of upcoming events
- **Website**
  - <http://retired.mn.aft.org>
  - Information updated on a regular basis
  - Calendar of events
  - Links to register for upcoming events
  - Includes links to information and organizations
- **Facebook**
  - Current information
  - Photos of activities
  - Links to register for upcoming events
  - Please “like” us or “follow” us on our page
- **Email Blasts:**
  - Important timely information on very current topics
  - Notification of events of interest

**If you have not given us your email address, please send it to [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org).**



**Education Minnesota Retired 2020 Annual Meeting  
Legislative Action Committee Report  
Chair: Joan Beaver**

**Member of the Legislative Action Committee:** Joan Beaver, Julie Jagusch, Walt Munsterman, Wes Hanna, Charles Hellie, Ed Mikulich, Sandra Skaar, Lowell Ueland, Lois Wendt, Susan Witt, Chuck Lyons, Dan Larson, and Joe Moren

**Legislative Action Committee Annual Report**

**Legislative Commission on Pensions and Retirement**

The Legislative Action Committee continues to monitor the actions of the Minnesota Legislature and, in particular, the Legislative Commission on Pensions and Retirement (LCPR), on issues which impact retired and active educators, as well as all retired and active union members. We are vigilant for any legislative attempts to change retirement benefits from defined benefits to defined contributions.

**TRA, PERA, SPTRFA**

We monitor and collaborate with the Teachers Retirement Association (TRA) board and staff in efforts to promote pension sustainability in legislative decisions. We continued to advocate for an additional Retired representative on the TRA board. We also monitor and collaborate with Public Employee Retirement Association (PERA) and St. Paul Teachers Retirement Fund Association (SPTRFA) for sustainable defined benefit pensions for all Education Minnesota Retired members.

**Education Minnesota PAC**

We continued to advocate for Retired representation on the Education Minnesota Political Action Committee, and a resolution was approved by the 2019 Education Minnesota Representative Assembly to add a non-voting Retired member to this committee.

**Member engagement**

The committee strives to educate and engage members in efforts to influence public policy regarding retirement and pensions, public education, and collective bargaining issues. We also strive to educate and engage members regarding candidates and campaigns for public office. We work closely with the Communications Committee in this effort. The chair serves on the Education Minnesota Legislative Action Committee where she reminds active members to enlist retired members in their locals to support legislative advocacy, political action, and collective bargaining activities.

## **2019-2020 Activities**

### **LCPR**

The chair and several committee members regularly attended LCPR meetings in the spring of 2019 as well as the meeting in December. Meetings scheduled in March and April were cancelled due to the COVID 19 virus. Most of the work of the commission for the 2020 Legislative session is focused on administrative (aka housekeeping) adjustments. The state budget passed by the Legislature and signed by the Governor, included funding to school districts for the increased amount of TRA contributions for active members. The LCPR staff is conducting a study of cost of living adjustments (COLA) which we will monitor.

### **Political conferences**

Several members attended the Education Minnesota Unity Summit conference January 31-February 1, 2020. The committee has begun discussion of strategies to organize Retired member support for the full funding campaign.

Education Minnesota Retired hosted the Retired Political Conference on February 4, at the Teacher Retirement Association building, to which members of Retired Educators Association of Minnesota (REAM) were also invited. The registration fee of \$20 covered the cost of coffee, rolls and buffet lunch.

President Julie Jagusch, LAC chair Joan Beaver, and REAM legislative co-chair Tim Moynihan welcomed participants. Speakers were

- Jay Stoffel, TRA executive director
- Doug Anderson, PERA executive director
- Bernie Burnham, Education Minnesota vice-president
- Representative Shelly Christensen
- Minnesota Secretary of State Steve Simon
- Jodee Buhr, Education Minnesota lobbyist
- Kristine Sundberg, Elder Voice executive director
- Megan Boldt, Education Minnesota communications specialist
- Kaye Peterson, Education MN PAC board non-voting member
- John Lipke, NEA Fund for Children and Public Education volunteer

We very much appreciated that the speakers took the time from their busy schedules to help inform retired educators about the condition of public pensions, the impact of elections on public pensions, and how we can better convey messages to the public and policy makers.

### **Lobby Day**

A lobby day for members to advocate for Education Minnesota priorities, support for defined benefit public pensions, and elder care issues was planned for March 24. However, the plans were cancelled before members were invited due to the COVID 19 virus.

# **Education Minnesota Retired 2020 Annual Meeting Membership Committee Report Chair: Judy Rohde**

## **Members of the Program Committee:**

Julie Jagusch, Larry Koenck, Walt Munsterman, Lori Nord, Judy Rohde, Mary Sack,  
Christine Thornborrow (Staff)

## **Membership Committee Report**

Effective September 1, 2015, active Education Minnesota members who are at least 55 years old, have at least 10 years as an Education Minnesota member (does not have to be continuous), are a member in good standing at the time of retirement and are eligible to receive for a public pension may qualify for retired membership with no additional cost. However, members must register for their retired membership as it is not automatic. Major efforts continue to be made to contact 2015-2019 retirees to register for retired membership.

Current activities to help inform active members of continuous retired membership include continued representation at:

- ESI workshops throughout the state
- Education Minnesota Retired regional meetings
- Education Minnesota Educator Academy (MEA)
- Representative Convention
- Summer Seminar

Postcards and brochures that inform members about continuous retired membership are available for distribution at our exhibit tables and for retired teacher luncheons/meetings.

Education Minnesota Retired Board of Directors will continue to contact the current local presidents (2019-2020) to remind their teacher and ESP members who are planning to retire this year or have already retired this year that they can continue their union membership as a member of Education Minnesota Retired with no additional cost if they meet the qualifications.

In addition, a paid retired membership is still available for those who retired prior to September 1, 2015 or do not meet the continuous membership qualifications. The committee continues to work on ideas to promote Retired membership.

Currently we have a total of 8,227 members. However, counts may fluctuate as members move between retired and pre-retired when taking long term sub positions. On the other side of this memo is a record of our membership history.

## HISTORICAL COUNTS

<b>Year-End</b>	<b>Pre-Retired</b>	<b>Continuous Pre-Retired</b>	<b>Retired</b>	<b>Continuous Retired</b>	<b>Total</b>
1999-2000	593		3,168		3,761
2000-2001	443		3,555		3,998
2001-2002	336		3,888		4,224
2002-2003	288		4,183		4,471
2003-2004	378		4,371		4,749
2004-2005	337		4,649		4,986
2005-2006	982		5,057		6,039
2006-2007	753		5,343		6,096
2007-2008	740		5,552		6,292
2008-2009	531		5,757		6,288
2009-2010	469		5,903		6,372
2010-2011	452		6,040		6,492
2011-2012	404		6,212		6,616
2012-2013	368		6,381		6,749
2013-2014	361		6,454		6,815
2014-2015	309		6,561		6,870
2015-2016	175		6,659	28	6,862
2016-2017	117	348	6,620	322	7,407
2017-2018	74	303	6,629	770	7,776
2018-2019	147	205	6,656	1,174	8,182

**Education Minnesota Retired 2020 Annual Meeting  
Nominations and Elections Committee Report  
Co-chairs: Boy and Betty Toy**

Members of the Nominations and Elections committee:

Betty Toy, Boy Toy, Julie Jagusch, Sharon Kjellberg, Warren Misiewicz,  
and Walt Munsterman

The nomination and election information was published in the Education Minnesota Retired Fall 2019 ACTION newsletter. Applications for the open positions were accepted. A ballot was prepared and mailed to the retired membership. On January 8, 2020, a group of retired members consisting of: Warren Misiewicz, Chris Misiewicz, Dennis Drinkwine, Ron Czerepak, Lois Wendt, George Dahl, Sharon Kjellberg, Sandra Skaar, Mary Ann Andreason, Myrna Doran, Joan Clark, Betty Toy, and Boy Toy met at the Education Minnesota headquarters building and counted the ballots. The results of the election were reported to the Education Minnesota Retired Governing Board on February 10, 2020. The Board certified the election results.

**Uncontested election results**

According to the Education Minnesota Retired Election Guidelines, if there are no additional candidates running for the positions(s) listed, the candidate(s) will be declared elected.

The following candidates have therefore been elected for these positions:

**President:** Julie Jagusch

**Vice President:** Wes Tessman

**Congressional District 2a Director:** Wes Hanna

**Congressional District 4 Director:** Joan Beaver & Judy Rohde

**Congressional District 6b Director:** Susan Witt

**Congressional District 8a Director:** Bobbie Margo

**Congressional District 8b Director:** Jan Cummings

## **Contested Election Results**

For positions with more than one elected party, the names elected are listed alphabetically. The 2020 winners and the positions are listed below:

### **2020 Education Minnesota Representative Convention – elect four**

**Julie Jagusch**

**Walt Munsterman**

**Jayne Schwalbach**

**Wes Tessman**

Marie Popp – 1<sup>st</sup> alternate

Victoria Ellis – 2<sup>nd</sup> alternate

John Lipke

### **2020 NEA Retired Annual Meeting/NEA Representative Assembly – elect eight**

**Charles Hellie**

**Julie Jagusch**

**Diane Larson**

**Bobbie Margo**

**Walt Munsterman**

**Judy Rohde**

**Jayne Schwalbach**

**Wes Tessman**

Marie Popp – 1<sup>st</sup> alternate

Victoria Ellis – 2<sup>nd</sup> alternate

Jeanne Brown-Kruesel

John Lipke

### **2020 At-Large Directors – elect one**

**Walt Munsterman**

Lori Nord

Jayne Schwalbach

Victoria Ellis

**PLEASE NOTE: All elected parties will take office after the Education Minnesota Retired Annual Meeting on April 24, 2020.**

**Education Minnesota Retired 2020 Annual Meeting  
Program Committee Report  
Chair: Lois Wendt**

**Members of the Program Committee:**

Lois Wendt, Julie Jagusch, Betty Toy, Boy Toy, Myrna Doran, Walt Munsterman, Mary Sack, Pixie Pixler, Bonnie Hermann, Jan Cummings, Chris Rasmussen

**Program Committee Report:**

The Program Committee is responsible for planning the programs for the Annual Meeting, Fall Conference and Fall Breakfast for the Education Minnesota Retired membership.

The 2019 Retired Annual Meeting was held on April 26 at Jimmy's Event Center in Vadnais Height, Minnesota. Attendees enjoyed a continental breakfast before an agenda of interesting and informative sessions. We had an update from Education Minnesota lobbyist Jodee Buhr followed by a session regarding elder abuse in Minnesota from Elder Voice Family Advocates.

After a wonderful catered lunch, we had our business meeting, followed by updates from Jay Stoffel, TRA executive director and Doug Anderson, PERA executive director. We also had a member benefits update by Christine Thornborrow. Attendees gave a very positive evaluation to all of the presentations as well as the location, free parking and food.

We did not hold a Retired Fall Conference last fall but rather hosted regional meetings throughout the state. The Education Minnesota Retired board of directors voted to have a Fall Conference again this year on Sept. 14-16 at Ruttger's Bay Lake Lodge in Deer Lake, Minnesota. Please watch for more details and registration information this summer. You won't want to miss this event!

Education Minnesota Retired Fall Breakfast was held in conjunction with the MEA (Minnesota Education Academy) conference on Thursday, Oct. 17 at the Science Museum of Minnesota. The guest speaker was Phia Vue, who spoke about identity theft targeting seniors. Also attending were officers and staff from Education Minnesota including Rodney Rowe, secretary-treasurer, Bernie Burnham vice-president and Jodie Buhr, lobbyist. The 2020 Fall Breakfast will be on Oct. 15 at the Science Museum of Minnesota. Make plan to attend.

# Statements of Principle



*Retired*



## Commitment to the Members

Education Minnesota Retired is responsive to the will of its members and is committed to promoting the welfare of each member by pursuing all political, legal, economic and professional support necessary. Education Minnesota will pursue this support through the development and enforcement of collective bargaining agreements, the promotion of local, state, and federal policies and legislative initiatives that ensure equitable compensation and retirement benefits, comprehensive health care, due process protection, continuing professional development and appropriate working conditions to ensure a successful career in education.



## Commitment to the Profession

Education Minnesota Retired believes in promoting professional excellence in education. Professional excellence includes recruitment, effective training and retention of education professionals as well as ongoing support for retired educators. Education Minnesota Retired believes that all teachers and education support professionals who are involved in the direct student contact instructional process must be appropriately licensed or credentialed; this includes proper credentials for higher education faculty. Further, Education Minnesota Retired believes that all school-related personnel must be trained and governed under internal mentoring and self-disciplining procedures.



## Commitment to the Learners

Education Minnesota Retired believes in enhancing all areas of education for the learner and access to affordable life-long education. Education Minnesota Retired is committed to promoting the successful development of each learner. Learning environments should be safe, comfortable, aesthetically pleasing and technologically current. Within these environments, Education Minnesota Retired is committed to promoting practices and policies that recognize different learners' needs and the importance of family involvement.



## Commitment to Public Education and the Community

Education Minnesota Retired believes public education—early childhood through higher education—is the cornerstone of our social, economic and political structure. The involvement of the entire community is essential for the future of public education.



## Commitment to Partner Organizations

Education Minnesota Retired believes members have the responsibility to work together to advocate collaboratively, for the benefit of retirees, with local, state and national partner organizations.



## Commitment to the Labor Movement

Education Minnesota Retired believes individuals are strengthened when they work together for the common good. As educational professionals and retirees, we improve both our professional status and the quality of public education when we unite and advocate collectively. As part of the larger labor movement, Education Minnesota Retired supports workers' rights to bargain collectively and extending the benefits of unionization to the unorganized.



## Commitment to Racial Equity and Social Justice

Education Minnesota Retired believes educators have a responsibility to help alleviate the racism, discrimination and poverty that prevent many Minnesota students from reaching their full potential. Education Minnesota Retired supports a statewide social justice and racial equity agenda, including opportunity for stable and secure retirement for all.