



Retired

RETIRED ELECTION RESULTS

Results can
be found on
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ACTION FROM THE PRESIDENT



Julie Jagusch

Warm winter greetings to all! I hope you had a wonderful holiday season.

Education Minnesota Retired has been very busy since our last newsletter. In September we held a successful and well-attended regional meeting in Alexandria.

Thank you to all of our members who attended and heard about the issues of elder abuse and Minnesota pensions. Also in September, many members attended the AFL-CIO Retiree Council conference. In October

we held our annual Fall Breakfast at the Science Museum where we learned more about scams targeted at senior citizens. In November we held our first ever joint Minnesota/Wisconsin Retired conference in Eau Claire. We heard from NEA-Retired President Sarah Borgman, former NEA Executive Director John Stocks and had the opportunity to choose two additional informational sessions. Members learned about travel, identity theft and heard about the two retired organizations. Those in attendance said it was a successful conference! I hope we can do this again and hold the next one in Minnesota so that it is easier for our members to attend.

We held out Legislative and Political conference on Feb. 4. We are in the process of planning two more regional meetings. We have tentatively scheduled one in Owatonna on April 2 and one in Duluth on April 7. Our Annual Meeting will be held on April 24 at the DoubleTree Hotel in Bloomington. Watch for registration information in our monthly e-newsletter, the Insider, on our Facebook page and on our website. These events are all still in the planning stages.

Some of you have asked, "What happened to the Fall Conference at Ruttger's?" It's back! On Sept. 14-16, 2020, we will be heading back to Ruttger's Bay Lake Lodge for the Fall Conference. Put this on your calendar! More information will be available in the next Action newsletter.

One request from me to you – please check with your retired colleagues and see if they signed up for Retired membership. If they have questions about membership, they can call Stephanie Berg at 651-292-4877.

Stay warm, stay healthy and stay union strong!

2019 MINNESOTA AND WISCONSIN RETIREE CONFERENCE

By Bobbie Margo



The first joint conference between Education Minnesota Retired and Wisconsin Education Association Council Retired (WEAC Retired) was held at the Best Western Hotel Conference Center in Eau Claire, WI, on Nov. 19, 2019. Over 60 participants enjoyed an opening session where we were able to meet with members from the other state.

Education Minnesota Retired President Julie Jagusch, WEAC Retired President Ginny Bosse and NEA Retired President Sarah Borgman provided opening remarks. Each president urged us to give generously to the NEA PAC and asked each of us to remain involved and vigilant with regard to union issues. President Borgman also stressed that it really doesn't matter if we are for or against impeachment; what matters is that we focus on the democratic process of the impeachment.



Sarah Borgman, NEA-Retired President



EM-R leadership



WEAC-R leadership

2019 MINNESOTA AND WISCONSIN RETIREE CONFERENCE CONTINUED

By Bobbie Margo



John Stocks,
former NEA executive director

After lunch, special guest John Stocks spoke. Stocks is now retired from his position as NEA executive director. However, he has been asked by NEA President Lily Eskelson-Garcia to remain as an “on board” consultant until after the 2020 election. Stocks reminded us that it takes 270 electoral votes to be elected as U.S. President. He also stated that there is very serious foreign intervention going on in our country along with a network of sophisticated social media intervention by the far right.

For example, robots are being used to put forth issues on websites

including trade agreement information, gun legislation and anti-union sentiments. These far right sites start to editorialize as we get closer to the election, making one believe that these “editorial statements” are fact. As these sites receive more hits, they qualify for far right advertisement. We need to be aware!



The biggest impact on this election will come from activists such as ourselves. We, as retirees, can be incredibly significant with regard to making a difference.

We are tough! We are good! We are strong! We must be vigilant. This is our democracy and it must be protected. Other special guests included former Education Minnesota Executive Director Larry Wicks, Education Minnesota President Denise Specht and Education Minnesota Vice President Bernie Burnham. The remainder of the day was spent attending breakout sessions and enjoying a dessert break. This joint conference was the first of its kind. Hopefully this activity will continue next year. The conference was time well spent with food, fun and retiree bonding with a

neighboring state.

2020 Election Results

UNCONTESTED ELECTIONS

According to the Education Minnesota Retired Election Guidelines, if there are no additional candidates running for the position(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

Retired Election District 2a Director: Wes Hanna

Retired Election District 4 Directors: Joan Beaver and Judy Rohde

Retired Election District 6b Director: Susan Witt

Retired Election District 8a Director: Bobbie Margo

Retired Election District 8b Director: Jan Cummings

Positions will commence following the Retired Annual Meeting on April 24. Register for the 2020 Retired Annual Meeting at retired.mn.aft.org/events.

Retired Election District 2b Director

and

Retired Election District 6a Director

Board positions remain open

Education Minnesota Retired leadership is eager to have representation from all areas of Minnesota. If you are interested one of these positions, please contact Stephanie Berg at stephanie.berg@edmn.org.

2020 Election Results

CONTESTED ELECTIONS

At-Large Director: Walt Munsterman

Education Minnesota Representative Convention Delegates:

Julie Jagusch

Walt Munsterman

Wes Tessman

Jayne Schwalbach

Marie Popp (1st alternate)

Victoria Ellis (2nd alternate)

John Lipke (3rd alternate)

NEA Retired Annual Meeting and NEA Representative Assembly Delegates:

Julie Jagusch

Walt Munsterman

Bobbie Margo

Diane Larson

Wes Tessman

Judy Rohde

Charles Hellie

Jayne Schwalbach

Marie Popp (1st alternate)

Victoria Ellis (2nd alternate)

Jeanne Brown-Kruesel (3rd alternate)

John Lipke (4th alternate)

Positions will commence following the Retired Annual retired.mn.aft.org/events.



Early voting for the Minnesota presidential primary is now available by mail or in person until March 2.

REPORT ON THE NOV. 23 PAC BOARD MEETING

By Kaye Peters

The Nov. 23, 2019, meeting of the Education Minnesota Political Action Committee focused on the upcoming elections with full funding of public schools set as the PAC's priority. In that vein, the PAC will work in 2020 to win a pro-public education majority in the state Senate and maintain the current pro-public majority in the Minnesota House. These priorities were set by the PAC board at its Sept. 21 meeting.

Endorsements and contributions will be decided strategically based on issues. Early endorsements will be made only when a candidate has demonstrated support from their district's educators through submission of a petition signed by 50 constituent educators for House districts and 100 for Senate districts.

The board is planning to maintain and build on the site-based initiative for 2020. The PAC has adopted four core strategies: build 4,400 worksite unity team leaders by Sept. 21, 2020, who are organic leaders in their buildings; take a build-test-build approach to achieving 100 percent voter turnout among members, especially strategic groups, on Nov. 3; organize parents and community members around a powerful message to unite and persuade support of public schools; and create issue-first legislative endorsement process for full-funding and race-class narrative trainings.

Kaye Peters, Education Minnesota Retired's member on the PAC board, will reach out to retired members to have these conversations. Since the role for retired members is new this year, the mechanism for growing participation, in lieu of a concrete worksite, is being developed.

Fall Breakfast



The annual Fall Breakfast was held at the Science Museum on Oct. 17, 2019. 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.



By Marti Zins



Oftentimes when we talk about pensions, the numbers are what people remember. The following are some statistics which might be of interest to you.

- TRA distributes about 150 million to eligible annuitants which help support local communities and economies
- The pension fund earned 7.3% last fiscal year
- If you break down the pension dollar, 70 cents of the dollar is from investment earnings, 16 cents is from the employers and 14 cents is from the employees
- There are 82,965 active members, 51,436 inactive members and 67,285 benefit recipients as of June 30, 2019
- The average retirement age is 63.1 years old with 22.6 years of service
- The average regular monthly benefit is \$2,190.81
- For the current retirement year, approximately 74% are female and 26% are male
- The vast majority of members retired in June with 48.7% and the least in February with 2.1%
- TRA's oldest annuitant is 114 years old and there are 119 annuitants age 100 or older
- The annuitant receiving benefits the longest has received them since July 1, 1967
- The projected average number of years a member retiring in 2019 will receive benefits is 28 years with a projected average lifetime benefit of \$772,800 (assuming a \$2,200 monthly benefit with no annual increase)
- There are 590 employer units participating in TRA
- The largest participating employers are Minneapolis Public Schools (4,325), Anoka-Hennepin ISD #11 (3,399) and Minnesota State (2,870)
- The pension benefit formula **multiplier** (currently 1.9% per year) × **years of service** × **high-5 average salary** × **early retirement reduction factor** (if any) = **annual lifetime benefit with no refund**
- The TRA funded ratio (actuarial value) as of July 1, 2019 is 76.8%

To keep up to date with TRA, visit minnesotatra.org to establish your personal account.

2020 RETIRED ANNUAL MEETING

DoubleTree by Hilton Bloomington-Minneapolis South

7800 Normandale Blvd.

Bloomington, MN 55439

Friday, April 24, 9:30 a.m.-3:30 p.m.

\$15/person before April 10 | \$25/person after April 10

Join Retired educators from across Minnesota as we gather for our 2020 Annual Meeting. We will have a full agenda including legislative, pension and senior advocacy updates. We will also conduct our business meeting where you will hear updates from the Retired board and vote on Constitution & Bylaw changes. Register by mail or online before April 10 and save \$10.



[Register today](#)

\$15/person before April 10

\$25/person after April 10

Mail registration form to:
Education Minnesota Retired
41 Sherburne Ave.
St. Paul, MN 55103

2020 Retired Annual Meeting

DoubleTree by Hilton Bloomington-Minneapolis South

7800 Normandale Blvd.

Bloomington, MN 55439

Friday, April 24, 9:30 a.m.-3:30 p.m.

\$15/person before April 10 | \$25/person after April 10

Name(s): _____

Address: _____

City/State/ZIP: _____

Phone: _____

Email: _____

Enclosed is \$ _____ for _____ reservation(s)



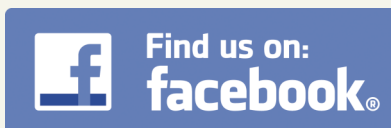
By Doug Anderson

Monthly benefit payments to retired members of the PERA General Employees Retirement Plan will increase by **1%** in January. PERA Police & Fire Plan retiree benefit payments will also increase by **1%** while PERA Correctional Plan retirees will receive a **1.6%** increase.

Annual retiree postretirement increases for PERA's General and Correctional members are tied to the same Consumer Price Index used by the Social Security Administration (SSA) to determine the annual Social Security benefits increase. The SSA recently announced that the January 2020 Social Security benefits increase will be 1.6%. General retirees receive 50% of the Social Security increase, but not less than 1.0% or greater than 1.5%. The 1.0% minimum will apply in 2020.

PERA moved to tie annual increases to a Consumer Price Index as part of the 2018 legislative package. The goal is to more closely connect increases to actual inflation during both lower and higher inflationary periods. This can help ensure more equitability from one generation to another. Past attempts to tie increases to investment returns, funding status, or use fixed rates have resulted in measurable intergenerational inequities for the PERA plans. The use of minimums, maximums and varying percentages were all a result of what each plan was considered able to afford.

Expected future annual retiree benefit payment adjustments vary for each statewide pension plan. While the PERA General Plan increases will vary annually, the Teachers Retirement Association increases are currently on a set schedule to be 1% for several more years until they start to increase by 0.1% each year until reaching 1.5% annually. Due in part to different plans using different approaches, the Legislature commissioned a COLA study to be completed by the end of 2020. The study is required to take into account the purpose of postretirement adjustments and whether governing statutes are consistent with that purpose. The study is also required to consider alternative methodologies for determining post-retirement adjustments and to evaluate the inflation based methodology currently used by PERA. Whether the study will result in any changes is difficult to determine. However, anyone who closely monitors their annual increase may want to pay attention to how that study progresses.

**Stay connected!**www.facebook.com/EducationMinnesotaRetired

We have regional meetings scheduled for this spring in Owatonna and Duluth. The regional meetings are open to all Education Minnesota Retired members and are a great opportunity to get together with one another. More information including how to register will be sent out in the March Retired Insider e-newsletter.

April 2, 2020 Owatonna

April 7, 2020 Duluth



SARAH SAYS...

By Sarah Borgman, NEA Retired President



Nope, no resolutions. Simply a look forward to 2020: that's often referred to as good vision (I like that) AND to hindsight being 2020, that's called assessment. That's as good a place to start as any: simply looking ahead clearly and looking behind to examine how far we've all come...both personally and professionally.

I'd like to remind you that ANY day is good to assess, to plan for future events as well as to rejoice in past accomplishments. I'm filling in spaces on a clean, clear calendar for birthdays and other celebrations, special events in my role as your president, and I'll confess to anticipating Election 2020.

I'm holding fast to my favorite candidate as polls count numbers, and I anticipate a positive change in the direction of our entire country. NEA has not yet endorsed a candidate and until we do, I continue to encourage you to support your favorite candidate, too. This is the democratic process we must always cling to. I can actually say I've enjoyed the debates. Interesting to see who sticks by his/her principles, who repeats the same phrases, who can look into the camera and give a passionate response and who speaks clearly about our schools and needs.

May 2020 bring us new hope, promises fulfilled and support for great public schools!

Education Minnesota has established a nonprofit, charitable organization whose purpose is to provide grant funds to members and certain other nonprofit groups. The Education Minnesota Foundation for Excellence in Teaching and Learning is governed by a Board of Trustees who are members of Education Minnesota.

Since its inception, the foundation has funded 868 projects and awarded more than \$2.4 million in grants. If you have any questions, please contact Education Minnesota Foundation Director at 800-652-9073
Mail contributions to:

**Education Minnesota Foundation
41 Sherburne Avenue
St. Paul, MN 55103**

F O U N D A T I O N C O N T R I B U T I O N S

Contributions to Education Minnesota Foundation
from Education Minnesota Retired Members

Name(s): _____

Address: _____

City/State/ZIP: _____

Home Phone: _____ Work Phone: _____

Email Address: _____

Enclosed is a check payable to Education Minnesota
Foundation in the amount of \$ _____

All donations to the Education Minnesota Foundation are tax deductible!

Mail contributions to: 41 Sherburne Avenue, St. Paul, MN 55103



Through affiliation with Education Minnesota, Education Minnesota Retired retains access to political action and resources essential in electing friends of education and the lobbying efforts essential to maintain and improve Minnesota teacher retirement programs. Concurrently, retired educators also remain vitally active and interested in educational programs critical to quality education in Minnesota.

To support these efforts, the Education Minnesota Retired Governing Board encourages retirees to contribute at least \$20 to Education Minnesota PAC.

Education Minnesota Retired members who contribute are eligible to participate on screening teams that interview candidates and recommend endorsements of friends of education. If you have questions, please contact Education Minnesota Public Affairs/PAC Dept. 800-652-9073

Mail contributions to:
**Education Minnesota PAC
41 Sherburne Ave.
St. Paul, MN 55103**

P A C C O N T R I B U T I O N S

Contributions to Education Minnesota PAC
from Education Minnesota Retired Members

Name(s): _____

Address: _____

City/State/ZIP: _____

Home Phone: _____ Work Phone: _____

Email Address: _____

Enclosed is a check payable to Education Minnesota
PAC in the amount of \$ _____

*Education Minnesota Retired members can participate on screening teams if they contribute to Education Minnesota PAC.

Mail contributions to: 41 Sherburne Avenue, St. Paul, MN 55103





Retired

2020 Winter Newsletter

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CALENDAR OF EVENTS

**Mark your
calendars!**

- | | |
|-------------|---|
| Feb. 4 | Retired Legislative and Political Conference |
| Feb. 11 | Legislative session begins |
| Feb. 25 | Minnesota precinct caucuses |
| March 3 | Minnesota presidential primary |
| March 13-15 | NEA Leadership Summit, Orlando |
| March 15-16 | NEA Retired Conference, Orlando |
| April 2 | Regional meeting - Owatonna |
| April 7 | Regional meeting - Duluth |
| April 24 | Retired Annual meeting |
| April 24-25 | Education Minnesota Representative Convention |
| Sept. 14-16 | Fall conference at Ruttger's Bay Lake Lodge |

Look us up on the web at
<http://retired.mn.aft.org>



<https://www.facebook.com/EducationMinnesotaRetired>