



Retired

# Action

## From the president



Julie Jagusch

I hope you have all had a great socially distant summer! I am so grateful to be retired and not have to go back to work this fall. My heart goes out to all the active educators who are trying to manage in-person classrooms with masks and social distancing, to those who are trying to manage a new hybrid learning situation and to those who are meeting their students for the first time online this year. Being an educator has always been challenging, but this pandemic has brought on a whole new set of challenges!

Nine Education Minnesota Retired delegates represented you at the NEA-Retired Annual Meeting and the NEA Representative Assembly this summer. Of course, we did this from the comfort of our own homes! It was very strange to attend a convention online, but elections were held and a limited amount of business was completed. I also represented you at the AFT Convention which was held online as well. Business and elections were completed. Both organizations voted to endorse Joe Biden for President of the United States.

We continue to hold committee and board meetings virtually through Zoom. However, we have had to cancel our planned Fall Conference at Ruttger's resort, as well as our Fall Breakfast at the Science Museum. We hope that things improve soon and we can go back to holding in-person gatherings.

Of course, we have a very important election coming up this fall. I plan to vote by absentee ballot. Please research your candidates to be sure you are voting for candidates who support public education and retired people. Visit the Education Minnesota voting guide at <https://www.edmnvotes.org/voter-guide> for more information.

One thing we plan to do is to hold a virtual conference in conjunction with the Wisconsin Education Association Council - Retired organization. We held a very successful and well-received in-person conference with them last year in Eau Claire and want to continue to work together. The registration information is on page 8.

Sadly, one of our long-time leaders and a member of our Governing Board has passed away. We lost Ed Mikulich on Aug. 5. He will be missed for his sense of humor, his pointed questions and his devotion to everything dealing with education. Ed spent his life advocating for educators as both an active and a retired member.

Stay healthy, stay strong and I hope to see you in the not too distant future!

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# Two Woman Warriors

By Bobbie Margo



AFT President Randi Weingarten,  
Education Minnesota President Denise Specht,  
NEA Past President Lily Eskelsen-Garcia

AFT President Randi Weingarten and former NEA President Lily Eskelsen-Garcia are women leaders who have made history. Weingarten is the first openly gay individual to be elected president of the 1.7 million members of the American Federation of Teachers. Eskelsen-Garcia was the first Latina to be elected president of the National Education Association. NEA is a membership of 3 million and counting.

Eskelsen-Garcia began as a school lunch lady eventually becoming an elementary school teacher. In 1989, she was named Utah Teacher of the Year. She expanded her union involvement and become state president of the Utah Education Association. Eskelsen-Garcia continued her union activism at the national level and was elected NEA Secretary/Treasurer, NEA Vice-President, and finally NEA

President. She held each position for the maximum 2 terms. She personally took on the fight to repeal “No Child Left Behind” and succeeded! In 2016, she took on the newly appointed Secretary of Education-Betsy DeVos. On Aug. 31, 2020, Eskelsen-Garcia retired from NEA as an active member and joined NEA Retired. Just like many of us in retirement, she will continue to fight for quality public education.

Weingarten was born in New York City. Her early interest in trade unions and political advocacy was formed when her mother’s public school union went on a seven week strike in 1974. Weingarten attended law school and handled high-level union grievances against the State of New York regarding school funding and school safety. She worked for 3 years as a lawyer for the firm of Stroock & Stroock & Lavin, as well as teaching law, political science, and U.S. Government at Clara Barton High School in Brooklyn. She, too, expanded her union involvement to become United Federation of Teachers president in 1997. In 2008, Weingarten became the president of the AFT, a position that she currently holds. Weingarten advocates a grassroots approach to education reform and says that public school officials should welcome the views and account for the needs of educators when working to help schools better serve their students.

Both Eskelsen-Garcia and Weingarten have worked hand in hand with labor leaders both nationally and locally. There is power within these two women; there is power within the people they represent. These two women are warriors, all in the name of public education.

## Sarah Says

By Sarah Borgman, NEA Retired President



Yes, the leaves are turning and so are the calendar pages. One month closer to elections...the BIG ONE. I must admit it can't come soon enough. I've heard enough wind blowing, and it isn't in the trees, to last me a lifetime! We are all hoping for normalcy but wonder if and when our lives will return to what we once knew. However, this I do know. Our retired members as well as state and local affiliates have been hard at work on elections, on conferences, on membership, and the start of another PAC fund collection. Can we break last year's record? I

say all this to remind us both that in some ways, we never left what's our routine and work. Retired members have been and continue to be workers, innovative, willing and successful. Join your colleagues in these activities and let's continue our good work!

# 2020-21 Education Minnesota Retired Nomination Form

## Retired member submitting this form:

Candidate Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email address: \_\_\_\_\_

## Candidate information

I am declaring myself as a candidate

I am nominating the following as a candidate

Candidate name: \_\_\_\_\_

Address: \_\_\_\_\_

City/state/ZIP: \_\_\_\_\_

Phone: \_\_\_\_\_ Email address: \_\_\_\_\_

## BOARD POSITIONS (Please check only one position)

- |   |  |
|---|--|
| <input type="checkbox"/> Secretary            | <input type="checkbox"/> District 5 Director |
| <input type="checkbox"/> Treasurer            | <input type="checkbox"/> District 5 Director |
| <input type="checkbox"/> District 1a Director | <input type="checkbox"/> District 7 Director |
| <input type="checkbox"/> District 1b Director | <input type="checkbox"/> District 7 Director |
| <input type="checkbox"/> District 3 Director  | <input type="checkbox"/> At-large Director   |
| <input type="checkbox"/> District 3 Director  |  |

View map of Retired districts [here](#) or at <http://retired.mn.aft.org>

## DELEGATE POSITIONS (You may run for one or both positions)

- Education Minnesota Representative Convention, April 23 - 24, 2021  
Bloomington, MN - (4 delegates)
- NEA Retired Annual Meeting, June 29 - 30, 2021  
NEA Representative Assembly, July 2 - 6, 2021  
Denver, CO (9 delegates)

Please provide your statement on the reverse side of this form.

# Nomination Statement

In 40 words or less, please indicate why you are running for each chosen position. If more than 40 words are submitted, the nominations committee reserves the right to edit.

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## Election Guidelines

- Elected candidates will assume office immediately following the Education Minnesota Retired Annual Meeting on Friday, April 23, 2021.
- Nominations must have the permission of the person whose name is being submitted for election.
- Nominees are required to attend all meetings at the conferences and events for which they are elected.
- Delegates to the NEA Retired Annual Meeting & NEA Representative Assembly will be reimbursed a maximum of \$3,000 toward expenses. Any expenses incurred over \$3,000 will be paid for by the delegate.
- All Education Minnesota Retired members will receive a ballot and should vote for board and delegate positions.
- Submit this form and a photo post marked by Nov. 14, 2020 to:  
**Education Minnesota Retired Nominating Committee**  
**41 Sherburne Avenue, St. Paul, MN 55103-2196**
- Digital photos may be submitted electronically to [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org).
- Photos and bios of each candidate will be included with the ballots that mail the week of Dec. 7, 2020.
- If you have questions, call the Education Minnesota Retired office at 651-292-4877 or 800-642-4624, or email [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org).

## Election Timeline

- Nov. 14, 2020 Nomination form **and picture** must be returned, postmarked on or before Nov. 14, 2020.
- Dec. 7, 2020 Ballots will be mailed to Education Minnesota Retired members the week of Dec. 7, 2020.
- Jan. 15, 2021 Ballots must be returned, post marked on or before Jan. 15, 2021  
**Education Minnesota Retired Elections**  
**41 Sherburne Ave.**  
**St. Paul, MN 55103**

# PERA Update

By PERA Executive Director Doug Anderson



PERA Executive Director  
Doug Anderson

One of the components of the significant 2018 statewide pension law changes was a movement by PERA to tie annual postretirement benefit increases to a Consumer Price Index (CPI). The goal is to more closely connect increases to actual inflation during both lower and higher inflationary periods. This helps 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 across the PERA plans.

Annual postretirement increases for PERA's General members are now tied to the same CPI as used by the Social Security Administration (SSA) to determine the annual Social Security benefits increase. General retirees receive 50% of the Social Security increase, but not less than 1.0% or greater than 1.5%. Since the law change, the COLA has been 1.4% in 2019 and the 1.0% in 2020. The 2021 COLA is yet to be determined, but the 1.0% minimum is likely to be applicable again.

Postretirement increases vary for each statewide pension plan. Due in part to different plans using different approaches, the 2018 pension legislation included a requirement for the Legislative Commission on Pensions and Retirement (LCPR) to complete a postretirement increase study 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 postretirement adjustments and to evaluate the inflation based methodology currently used by PERA.

PERA's postretirement increases are intended to both provide inflation protection and to improve intergenerational equity. The use of a CPI serves as a way to both measure inflation protection and to compare benefits across generations. Ideally, if all members always received an increase equal to 100% of CPI each year, both goals would be met.

Undoubtedly there will be some stakeholders desiring better inflation protection now in the form of a higher CPI percentage in the PERA formula or a higher cap (or both). This type of increase would require either contribution increases or jeopardizing the health of the plan. Increasing benefits does not seem to be the intent of the LCPR study.

While increasing inflation protection now may not be imminent due to cost concerns, there is still possibility to take another step towards the second goal of trying to improve intergenerational equity. A possible next step for the PERA plan is to consider widening the current narrow range between the minimum and maximum benefit increases. This change would not significantly change the expected long term benefits or costs of the plan, but it would be a step closer to the goal of retirees receiving consistent inflation protection across generations when measured against CPI. The PERA component of the LCPR study will likely focus on its second goal of improving comparability of benefits across generations rather than trying to increase the current CPI percentage or maximum benefit.

## 2020 Virtual Medicare Made Easy Seminars

As a member of Education Minnesota, you and your spouse/partner are eligible for group Medicare solutions offered through Humana, Medica and UCare. Attend one of our Medicare Made Easy seminars to learn more about Medicare and the benefits of group insurance. We will cover the basics of Medicare – Parts A and B and provide you with an overview of plans only offered to Education Minnesota members.

Tuesday, Oct. 20, 2 p.m. - 3:30 p.m.

Saturday, Oct. 24, 9 a.m. - 10:30 a.m.

Wednesday, Nov. 4, 4 p.m. - 5:30 p.m.

Thursday, Nov. 12, 10 a.m. - 11:30 a.m.

[Register here](#)

or contact Deb Skog at

651-292-4856 |

deborah.skog@edmn.org

This meeting is for Education Minnesota members only.

If you are not a member and would like to join, please do one of the following

Retirees – complete the online form at [www.educationminnesota.org](http://www.educationminnesota.org)

All others – contact your local

## GOTV - Nov. 3

As Election Day approaches, Education Minnesota is asking locals and worksites to hold actions to get out the vote. We want to make headlines by showing educators and community members coming together to vote for pro-public education candidates.

Active educators are being asked to hold a get-out-the-vote event at their worksite or in their community on Nov. 2.

There will be statewide car parades at schools all over the state on Nov. 2, and not just car parades. Locals are going to find all sorts of ways to draw attention and motivate pro-education voters.

The events will be before or after the school day at your building. If your district isn't doing in-person learning, we are hoping they find a good alternative.

Please reach out to the local union leaders in the district that you live and see how you can support. Retired members can of course attend, but also help in recruitment of community members to stand in solidarity for voting for pro-public education candidates.

More information about what locals might be doing at [edmnvotes.org/nov2](http://edmnvotes.org/nov2).



# NEA Retired Annual Meeting and NEA Representative Assembly

By Bobbie Margo

The 37th NEA Retired Annual Meeting was held virtually on June 29-30. Virtually means that each and every one of the attendees could attend in their own homes, offices, etc. I was able to attend in my rumpled house clothes and no one was the wiser! President Sarah Borgman called the meeting to order; the Pledge of Allegiance and the National Anthem were done by NEA President Lily Eskelsen Garcia. Garcia sang and played her guitar then spoke briefly. She spoke about how retirees are powerful and strong. Garcia also reminded us that as of Sept. 1, she will be one of us. NEA-R membership keeps growing, at last count we are 321,985 strong!

The virtual Retired Annual Meeting met for two hours each day. Due to the limited agenda, there were no new business items. However, there was discussion and debate on one proposed amendment to the NEA-R bylaws, article VII, section 2. A proposed new subsection that allows the NEA-R President to temporarily serve as the duly elected alternate for NEA-R members of the NEA Board of Directors in the event that no alternate is available.

NEA-R President Borgman delivered her address. She spoke about the upcoming election and challenged us to make ability, creativity, responsibility, activity, possibility and opportunity work for us. The remainder of day one was used to present awards. Our own Education Minnesota Retired won first place for largest percentage of membership gain with 1.052%. We were also added to the Membership Hall of Fame. Any award winner that has earned a membership award three times in the same category becomes a member of the Hall of Fame. A member of the Hall of Fame is not eligible to win in the same category for three years. Congratulation Education Minnesota Retired! The second day of our virtual meeting concluded with candidate speeches. Voting for candidates and the bylaw proposal will be done by secret mail-in ballot this year.

Retired delegates also attended the 158th Annual Meeting and the 98th NEA Representative Assembly virtually on July 2-3. In her keynote address, President Lily Eskelsen Garcia reminded us to speak up, to speak out and to speak for the National Association so that it can continue to do its work. There were over 7,200 delegates who listened to messages from former First Lady Michelle Obama and from former Vice President Joe Biden. Each thanked the delegates for demonstrating to their students the determination that it takes to create a better future for themselves and for their communities.

Delegates also heard from Teacher of the Year Tabatha Rosproy, Higher Educator of the Year Elizabeth Davenport, ESP of the Year Andrea Beeman, and NEA Executive Director Kim Anderson. Anderson is the first woman and person of color to be executive director. Candidate speeches were also given. This year, voting for candidates will be done by secret mail-in ballot along with voting to approve the NEA 2020-2022 Strategic Plan and Budget and presidential endorsement.

The 2021 Representative Assembly will be held on July 2-6 in Denver, Colorado. On behalf of Victoria Ellis, Charles Hellie, Julie Jagusch, Diane Larson, Walt Munsterman, Judy Rohde, Jayne Schwalbach, Wes Tessman, and myself, we sincerely thank you for giving us the opportunity to represent our state and our retired organization. We represented you with pride, purpose and professionalism!

**Registration extended to November 12!**

**LET'S GET TOGETHER!  
(VIRTUALLY OF COURSE!)**

# **Joint WEAC-Retired & Education Minnesota Retired Conference**

Wednesday, November 18  
10:30 AM - 12:30 PM  
Zoom Virtual Meeting Platform

The Second Annual Joint State Conference with WEAC-Retired and Education Minnesota Retired will be held virtually on Wednesday, November 18, 2020.

Please join us as NEA-Retired President, Sarah Borgman makes introductory remarks, followed by NEA President, Becky Pringle who will present the keynote address about the results of the presidential election and where we are headed now. Also, Stephanie Smiley, the Director of the Bureau of Communicable Diseases from WI Department of Health Services will speak about Covid-19 and its effects on retirees.

It is free to attend this 2-hour virtual conference but to receive the Zoom link, we ask that you pre-register by **November 12** at <https://cvent.me/WLO9qL>

We hope that you will be able to attend!



**Becky Pringle,**  
NEA President  
& Keynote Speaker



**Sarah Borgman,**  
NEA-Retired  
President



**Stephanie Smiley,**  
Director of the Bureau  
of Communicable  
Diseases from WI DHS



Please pre-register at <https://cvent.me/WLO9qL>



# TRA Update

By Marti Zins



TRA Board Chair  
Marti Zins

The TRA board has been active this summer and met for all functions remotely. Here is a summary of issues we dealt with this summer.

- June board meeting - J. Michael Stoffel was rehired as Executive Director, Marti Zins was reelected board chair, Luke Olson was elected vice-chair and Joel Stencel was appointed chair of the audit committee with Denise Anderson vice-chair. A budget for fiscal year July 1, 2020 – June 30, 2021 was adopted. An application process for replacement board member Marshall Thompson, who resigned to seek other employment, was authorized.
- August special meeting - The TRA Board reviewed six applicants for the open board position and after a thorough discussion of candidates, Noel Raph, special education teacher in the Osseo Area Schools, was selected as the replacement. He will serve through June 30, 2021, at which time he can decide to run for election to a new term.
- August information meeting - The Board reviewed the actuary information, received an update from Mansco Perry, Executive Director of the State Board of Investments (SBI), reviewed TRA Board fiduciary responsibilities, looked at TRA funding information and gathered information that will form the basis of any future Board actions and decisions.
- TRA Board members participated virtually in the annual summer trustee workshop taught at University of California Berkeley Center for Executive Education Haas School of Business. There were thoughtful discussions about guiding pension funds through turbulent waters. A wide range of topics were discussed including investments, staffing, working from home, fraud issues, restructuring the work place and federal legislation. All of the TRA board member participated.

We were saddened to learn that effective Sept. 1, MMB Commissioner Myron Frans, a wonderful pension advocate, stepped down as Commissioner to become the University of Minnesota's senior vice president of finance and operations. He will be missed and we thank him for all his work on behalf of the state, educators and schools in Minnesota as well as his work with the finances of Minnesota. His replacement is Jim Schowalter who worked under both Governors Dayton and Pawlenty.

Thankfully, nothing concerning TRA has come to play at any of the state special legislative sessions to date, although we continue following activities. Additionally, we have finally received a salary range for our TRA Deputy Director and will be working to get that position posted and hired. Staff continue to work from home and all pension payments continue to be paid in a timely way. For the foreseeable future TRA staff and the Board will continue to operate remotely. The annual audit of TRA has been progressing with a final report to be issued soon. TRA retiree numbers are being processed at about the same pace as the past few years, while more inquires about disability are being made.

I would urge you to go to [MyTRA.org](http://MyTRA.org) to for pension updates and access your account. Be well and safe.

# Education Minnesota Unity Summit

By Joan Beaver



Several Education Minnesota Retired members attended the Education Minnesota Unity Summit back in January, before everything changed.

75 percent of the funding that is available to our local school districts comes from the state. While there is a little funding from the federal government, the inequality of local tax bases leads to inequality of the other 25 percent. Districts vary greatly in the amount of “excess” levies they are able to pass in referendums, some even have zero “excess” levies.

The focus of the conference was to develop the knowledge and skills to work with members and community members to elect Minnesota legislators who will support fully funding public education and then advocate with those legislators to find ways to provide that equitable funding for public schools.

With the pandemic, the inadequacies of school funding and equity issues are even more evident than they were at the time of the conference in January.

As retired educators, we understand the needs of our public schools and we are in a position to help other community members understand and advocate for full funding. For more information visit [www.edmnvotes.org](http://www.edmnvotes.org).

## Open retired seat on the TRA Board

The TRA Board of Trustees is seeking candidates to fill one retired-member seat on the board. The term of retired teacher Martha Lee Zins expires June 30, 2021. The new four-year term for this position begins July 1, 2021. There are no term limits on board positions.

Trustees meet about six times a year to oversee the administration of the pension fund. Board members act as TRA fiduciaries in accordance with Minnesota law and are subject to state economic interest disclosures.

To request an application, call TRA at 651-296-2409 or 800-657-3669 or download one at [www.MinnesotaTRA.org](http://www.MinnesotaTRA.org). The application must be received at TRA’s office by 4:30 p.m. on Fri., Dec. 18.

Eligible members will receive ballots and candidate biographies in early spring. Only retired members are eligible to vote for retired-member board positions.

Election results will be certified by the Board of Trustees in June 2021 and published on [MinnesotaTRA.org](http://MinnesotaTRA.org).

F o u n d a t i o n  
C o n t r i b u t i o n s

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, Dayonna Knutson at 800-652-9073  
Mail contributions to:

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

P A C  
C o n t r i b u t i o n s

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 Dept. at 800-652-9073

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

[OBJ]



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 Ave., St. Paul, MN 55103

[OBJ]



*Retired*

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U.S. POSTAGE  
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## Fall 2020

Education Minnesota Retired  
41 Sherburne Ave.  
St. Paul, MN 55103  
<http://retired.mn.aft.org>

Phone: 651-292-4877 / 800-642-4624  
Fax: 651-292-4815  
Email: [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org)

### C a l e n d a r o f E v e n t s

Nov. 18      Joint WEAC-Retired and Education  
                 Minnesota Retired conference—virtual

See "Calendar" on [www.educationminnesota.org](http://www.educationminnesota.org) for additional Education Minnesota, NEA and AFT meetings, events and other information.



<http://retired.mn.aft.org>