



Retired

Action

From the President

REGISTER TODAY!

2017 Retired
Fall Conference
September 11-13

Ruttger's Bay
Lake Lodge
Deerwood, MN

Registration form
inside.



Julie Jagusch

I am very excited to begin serving as your president of Education Minnesota Retired. I am ready to face this challenge with energy and willingness to lead our members.

In April we had our Annual Meeting at the Doubletree in Bloomington. I was so happy to see so many members turn out for this important meeting. Thank you to those who attended. It was especially great to see so many new faces! I hope to see many of you at our upcoming fall breakfast and fall conference. Please look for registration information in this newsletter.

As we go forward, we face many challenges to our retirement benefits, including our pensions, Social Security, and Medicare. We must all continue to be vigilant about these topics and contact our elected representatives both at the state and national level to remind them of the importance to maintain these earned benefits. If you need help with talking points, check out our Education Minnesota Retired Facebook page, Education Minnesota's Facebook page and website, and also check out the TRA website.

One of my goals is to better serve the needs of members in Greater Minnesota. We are considering starting regional meetings, but have not yet decided on places or dates. If you have ideas on how Education Minnesota Retired can be more relevant for you, please feel free to contact us through a Facebook message or emailing Matt.Blewett@edmn.org or leaving us a message at 800-642-4624. We would love to hear from you, our members.

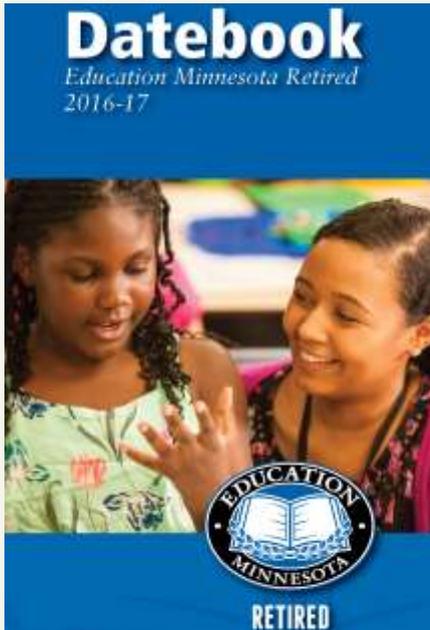
INSIDE

Order your datebook/ Membership Registration	2
Pension Update	3
2017 Annual Meeting	4
2017 NEA Retired Organizing Conference	5
2017 Fall Conference	6-7
2017 NEA Leadership Summit	8
Fall Breakfast Leadership Summit	9
Education Minnesota recognizes Julie Jagusch	10
Foundation/PAC Contributions	11

Reminder: It is important to check your pension beneficiary designations. As life happens (marriage, divorce, death) your beneficiaries may change and it is crucial to keep your beneficiary designations up to date.

To check your beneficiary designations call
TRA: 800-657-3669 | PERA: 800-652-9026
St. Paul (SPTRFA) 651-642-2550

Request your 2017-18 datebook by July 31



Education Minnesota Retired Datebooks will not be automatically mailed to you this year.

If you would like one, please send an e-mail to: Matt Blewett at matt.blewett@edmn.org. He will need:

1. Name
2. Address
3. Phone Number

There is no cost to request the 2017-18 Education Minnesota Retired Datebook. Simply send a written request to matt.blewett@edmn.org with the information above and request your copy of the datebook. Datebooks will be mailed in the Fall.

Important information for 2017 Retirees Please notify your newly retired colleagues

www.educationminnesota.org

Memberships: **Retired**

Advocacy *your voice* | Benefits *why belong* | Events *get involved* | Resources *your work* | Community *engagement* | News *stay updated*

Do you know any members who retired this year?
Have them register at www.educationminnesota.org.
Click the “retired” membership link at the top of the page and click **“Register Today”**

TRA Pension Update

By Marti Zins

Déjà vu all over again.

How frustrating has this legislative session been? Let me outline the scenario.

The state had a \$1.6 billion dollar surplus. The Governor put money up front in his budget to the legislature for TRA pensions. Since nothing was done last year (recall the bill was vetoed), something had to be done this session to make a course correction for the continuing stability of the TRA fund. This is the funding year of the two- year legislative cycle. TRA staff worked diligently, to educate new and returning legislators on both sides of the aisle. TRA stressed the importance of getting something done this year especially with the vetoed bill from the previous session which included TRA administrative changes. TRA was told that something would be done this year and that money would be budgeted up front so as not to create a scramble at the last minute. Folks from both parties gave assurances things would get done.

The TRA board reworked the pension information, updating to reflect new numbers. Detailed and researched information formed the backbone of the proposal, not a knee-jerk reaction to the market. TRA had input and discussion from stakeholder groups about the elements of the bill, continued the philosophies of “shared sacrifice” and not funding pensions on the back of educational dollars for the classroom. TRA presented the revised document to the Legislative Commission on Pensions and Retirement (LCPR).

Committee composition changed with the November election. The LCPR reviewed and identified 32 items to remove or alter from existing statutes, returning to the legislature more direct pension control and less autonomy to pensions. Recall, TRA was told something would be done to right the pension course. Meanwhile, several LCPR meetings were cancelled and those held, centered more on the LCPR list mentioned above than the actuarial information from TRA. Our friends tried mightily to bring some pension issues forward but were unsuccessful.

Finally, legislation passed through committees and sent as part of the budgeting process to the Governor stating enactment was contingent upon available money. Pensions became a bargaining chip. Meanwhile the Governor, House and Senate leaders worked to bring resolution to a budget deal before the session ended. Each side had some items demoted, left on the table, or placed in bills that were identified for veto by the Governor. New pension money was not in the final bills so no pension bills survived for lack of funding, or were in vetoed bills. Result: no new money, no pension administration bill again. The status quo continues.

Finally, while thankfully state government will not be shut down, pensions aren't among the current items listed if there is another special session.

TRA and all the pensions that are at status quo will regroup and continue to seek necessary legislation in the future. Stay tuned. And yes elections matter. Ask the legislators that represent you where they stand on pensions and funding and share your perspective.

TRA Pension Notes

- Current law remains unchanged
- Retired annual 2% COLA continued in 2018
- Early retirement remains the same
- Active teacher (employee) and School District (employer) contribution rates remain at 7.5%
- Assumption rate of return on investments remains at 8.5%

Visit www.minnesotatra.org for news, updates and additional resources.



Retired

2017 Retired Annual Meeting

DoubleTree in Bloomington
April 21, 2017

Highlights

- Installation of new officers
- 100 + attendees
- 1/3 attended for the first time
- Fantastic food
- Great speakers



Newly elected board members, Walt Munsterman (vice-president), Julie Jagusch (president), Lori Nord (at-large), Judy Rohde (district 4), Jerry Klebs (2), Bobbie Margo (8), Jan Cummings (8), outgoing president, Larry Koenck and Education Minnesota Secretary-Treasurer, Rodney Rowe



Outgoing Education Minnesota Retired President, Larry Koenck



Our largest Retired Annual Meeting ever!



Newly sworn in board members, Julie, Lori, Walt, Judy, Jerry, Bobbie & Jan with outgoing president Larry Koenck.



Dan Mikel gave a Social Security update



Bob Hoffman, Bobbie Margo, Julie Jagusch and Walt Munsterman



TRA Executive Director, Laurie Hacking updates attendees on proposed changes to TRA.



Julie Jagusch & Larry Koenck

NEA Retired Organizing Conference

By *Bobbie Margo*

This year's NEA Retired Organizing Conference was held at the Renaissance Hotel in Dallas from March 21-23, 2017. Dallas is famous for J.R. Ewing and the Dallas Cowboy Cheerleaders. Myrna Doran, Julie Jagusch, Larry Koenck, Bobbie Margo, Walt Munsterman, and Judy Rohde represented ED MN Retired, along with staff Christine Thornborrow. Attendees numbered 240+ with participants representing 39 state retired organizations throughout the country.

The conference began on the evening of Tuesday, March 21. Keynote speaker was Mel House. House is a social justice warrior, along with being an educator. Her belief is that we must own our senior citizen status! As seniors, we are long established with history and are an invaluable piece of the NEA puzzle.

Wednesday's activities included informal sessions and breakout workshops. The day's keynote speaker was Judy Bryant. Bryant is one of us-having taught for 32 years and is now retired. Her message is simple-we must protect our pensions! Pensions not only matter to retired educators but also to active educators. We must remain vigilant to shortsighted political attacks. Union history demonstrating solidarity power must be kept on track.



Christine Thornborrow, Larry Koenck, Judy Rohde (back)
Walt Munsterman, Myrna Doran, Julie Jagusch & Bobbie Margo (front)
represented Education Minnesota Retired.

The conference concluded on Thursday, March 23. Al Campos, NEA Federal Lobbyist, provided a legislative update. Campos stated that NEA strongly opposes the Neil Gorsuch nomination to the U.S. Supreme Court. Sadly, as of this writing, Gorsuch has garnered the necessary votes, and he is now a United States Supreme Court Justice. The Affordable Care Act continues to be attacked. If a revision is passed, 24 million people could possibly lose their health care coverage. Such an uneven revision would be like "putting lipstick on a pig!"

The closing keynote speaker was NEA Vice-President Becky Pringle. Pringle provided an overview of how to increase awareness of systemic racism in our education settings. Final activities included fund raising for the NEA Fund for Children and Public Education and the Jack Kinnamon (Cat in the Hat) Scholarship Fund. Plans for the 2018 NEA Retired Organizing Conference will be announced in the coming months. The 2017 Conference provided national speakers, skill development and knowledge as well as opportunities to network with peers—priceless!

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

Keep informed with news and events on our website and Facebook page.

[facebook.com/EducationMinnesotaRetired](https://www.facebook.com/EducationMinnesotaRetired)

Complete the registration form

Join your colleagues at Ruttger’s Bay Lake Lodge in Deerwood, Minnesota to learn, socialize and relax with old friends and new ones!

Register Today!

Registration details on page 7

AGENDA

Commuter rates
 \$20/person plus food
 \$19/Breakfast
 \$19/Lunch
 \$38/Dinner

MONDAY, SEPTEMBER 11, 2017 (HOTEL CHECK-IN 5:00 p.m.)

4:00 – 5:00 p.m.	Registration/Check-In—Register and Check In	
5:00 – 5:30	Reception/Social Hour	
5:30 – 6:30	Dinner	
7:00 – 8:00	Entertainment:	Minnesota Gold: Patrick Mader

TUESDAY, SEPTEMBER 12, 2017

7:30 - 8:30 a.m.	Group Breakfast	
8:45 – 9:30	Welcome	Education Minnesota Retired President: Julie Jagusch
9:30 – 9:45	Break	
9:45 – 10:45	Group Session	Impact of the Stock Market on Retirees: Kent Schutte
10:45 – 11:00	Break	
11:15 – 12:00	Group Session	Healthy Living As You Age: Paula Woischke and Melissa Hjelle
12:00 – 1:00 p.m.	Lunch	
1:00 – 1:50	Group Session	Senior Scams: Minnesota Attorney General’s Office
1:50 – 2:00	Break	
2:00 – 2:45	Legislative Update	Education Minnesota Lobbyist: Jodee Buhr
2:45 – 3:15	Breakout Session	Member Input: What do you want from your board?
3:15 – 5:00	FREE TIME	Pontoon Boat Ride, golfing, shopping...
5:00 – 6:00	Social Hour	
6:15 – 7:15	Dinner	
7:30 – 8:30	Entertainment	Dos Guys
8:30 - ?	Bonfire and Social	

**Registration information
on next page.**



WEDNESDAY, SEPTEMBER 13, 2017

7:30 - 8:30 a.m.	Group Breakfast	
8:45 – 9:15	Group Session	Education Minnesota Update: Rodney Rowe, Secretary-Treasurer
9:15—10:00	Group Session	The Value of Belonging/Member Engagement Education Minnesota Staff
10:00 - 10:30	Break	(Hotel check-out 12 p.m.)
10:30 – 11:30	Group Session	TRA Update: Laurie Hacking, TRA Executive Director
11:30 – 12:00	Wrap-up and Prizes	

Your registration includes:

- 2 Nights stay
- Day 1: Dinner
- Day 2: Breakfast, Lunch & Dinner
- Day 3: Breakfast

Registration information and more details are on the next page.

Register by September 1, 2017 and receive a \$50 gift card.

Make sure to invite a friend!



Education MN Retired
Monday, September 11, 2017
To Wednesday, September 13, 2017

GROUP PACKAGE RATE:
 \$306.62 Double Occupancy Per Person
 (with 2 people per bedroom)
 \$410.52 Single Occupancy Per Person
All attendees and guests must be on the Conference package

Includes:

- 2 nights lodging.
- Meals daily beginning with dinner on day of arrival; ending with breakfast on day of departure.
- Meeting facilities
- Unlimited golf on the *Alec's Nine*
- Minnesota Sales Tax

Rooms are assigned on a first-come, first-serve basis.

Check In After 5:00 P.M.
Check Out Before 12:00 P.M.

CANCELLATION POLICY:

NO REFUNDS on reservations cancelled less than 30 days prior to arrival. Prior to 30 days before arrival, a \$25.00 processing fee will be deducted from your pre-payment.

Questions? Please email:
 Renee.Larson @Ruttgers.com

Education MN Retired
Monday, September 11, 2017
To Wednesday, September 13, 2017

DEADLINE FOR RESERVATIONS:

August 12, 2017
Note: Reservations will be accepted until the date of arrival based on availability

Prepayment Required

Mr./Mrs./Ms. _____
 Address _____
 Suite / Apt. # _____
 City _____ St _____ Zip _____
 E-mail _____
Confirmations will be mailed to the above address
 Day Phone (____) _____
 Representing _____
 Arrival _____ Departure _____

_____ Single Occupancy
 _____ Double Occupancy

Roommates: Each attendee must complete a separate reservation form. List the name(s)/roommate(s) you have selected.

If your designated roommate does not register, you will be charged at a single rate.

Special Requests:
Room Accessibility/Special Dietary

Pre-Payment Options.

Your Credit Card will be charged upon receipt of form.

Credit Cards- Please circle below:
 Visa / Mastercard / Discover / American Express
 CC# _____

Exp. Date _____ CVD # _____

Amount \$ _____

Signature: _____
In the event of a miscalculation, I authorize Ruttger's to charge to my credit card an amount Ruttger's reasonably deems to be accurate.

Check (Please enclose with form & make payable to Ruttger's Bay Lake Lodge)

Purchase Order (Purchase order must be received prior to conference)

Amount \$ _____

MAIL to: Ruttger's Bay Lake Lodge
Attn: **Conference Planning**
 P.O. Box 400
 Deerwood, MN 56444

Fax to: 218-678-2864 (attn: Conference Planning)

Email to: Renee.Larson@ruttgers.com

To avoid duplication, please only use one of the options above to submit your form.

Questions? Please call 800-450-1350 or if you have not received confirmation within 2 business days.

Our receipt of your reservation form with payment by credit card, check or purchase order signifies that you accept all the terms and conditions on this reservation form.

NEA Leadership Summit

By Bobbie Margo



Retired board members, Bobbie Margo and Judy Rohde with Education Minnesota President, Denise Specht at the NEA Leadership Development Summit.

The Annual NEA Leadership Summit was held in Orlando, FL. February 24-26, 2017. Orlando is known for theme parks, theme parks, theme parks – Disney and Universal being two of the main parks. The Conference was held at the Hyatt Regency Orlando. Conference participants numbered 1,500+ educators from across our nation.

This was a conference mainly for “active/currently employed” NEA members. Judy Rohde and I decided to attend (our time/our money) because such conferences are always empowering and inspiring. The theme of this year’s conference was “Unite, Inspire, Lead-Our Students, Our Union, Our Future.” Education MN was

represented by 54 participants from the active ranks. Our own ED MN President Denise Specht was part of the NEA Summit Design Planning Team.

NEA President Lily Eskelsen Garcia opened the conference on the evening of February 24. Eskelsen reminded the participants that as an association we must continually ask ourselves how we can elevate all of our students and give them the knowledge and the skills they need to be successful. The evening’s keynote speaker was Cindy Atlee. Atlee is an innovative coach, facilitator, and branding/engagement consultant. She believes that every individual and organization has a powerful story to tell. Each and every one of us has our own story to tell—whether it be a story from our own education as a child or a story from our own career as an educator. These stories shape who we are, our beliefs and our goals, our very fabric.

Albeit small, NEA Retired did have a presence. Judy and I attended the NEA Retired Caucus. NEA-R Secretary/Treasurer Martha Karlovetz listed the NEA Retired Budget requests for 2017—2018 from the TOTAL NEA Budget. Keep in mind that NEA-R is the only segment of NEA that has shown an increase in membership. We show 312,000+ members.

Continued 

Stay Connected

[facebook.com/educationminnesotaretired](https://www.facebook.com/educationminnesotaretired)

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

2017 Retired Fall Breakfast

Fall Breakfast

Registration Form
The cost is \$15/person.

St. Paul Science Museum

Thursday, October 19
 9:00 - 11:00 a.m.

Registration Deadline:
 October 16, 2017

Enjoy a delicious breakfast buffet! Then check out the Education Minnesota MEA Conference at the Saint Paul RiverCentre, to visit exhibits and attend various sessions .

Retired Fall Breakfast

Thursday, October 19, 2017

Join Education Minnesota Retired

At the 2017 Retired Fall Breakfast

After the presentation take in the MEA Conference

Enclosed is \$_____ for _____ reservations. (Cost is \$15/person)

Name(s) _____

Address: _____

City/State/ZIP: _____

Phone: _____

E-Mail Address: _____

Visit the Retired Facebook page and website for online registration.

REGISTRATION DEADLINE: October 16, 2017

Cut out and mail Registration Form and check payment to:

Education Minnesota Retired 41 Sherburne Ave., St. Paul, MN 55103

Full breakfast buffet included!



Leadership Summit continued

NEA-Retired Budget Requests:

1. 1.5 staff allocation to work specifically for NEA Retired – 4 years ago we had the equivalent of 2.3 staff
2. Increase funding for NEA Retired Organizing Grants to \$200,000
3. Reinstate the February face-to-face meeting of the NEA Retired Executive Council
4. Increase funding for NEA Retired Annual Meeting
5. Provide funding for members of the NEA Retired Executive Council to attend at least one national conference

The annual dues for NEA Retired will increase for \$30 to \$35 effective with the 2017-2018 NEA Modified Strategic Budget. It's probable that there will be an increase in NEA Lifetime dues effective with the 2018-2020 Budget. (It has been 5 years since we had a dues increase.)

The final keynote speaker on Sunday, February 26 was Melissa Harris-Perry. Harris-Perry hosted her award winning television show from 2012—2016 on weekend mornings on MSNBC. She reminded us that as educators, we are a mirror. We must keep our values and our actions positive-this “positiveness” will reflect back to our students.

The challenges in front of us as retirees demand our sharp focus and our highest commitment. My wish is that next year I could find the money and the time for all of you to attend the 2018 National Leadership Summit.



Education Minnesota recognizes Retired President, Julie Jagusch

Jagusch brings passion for union work to new role as Education Minnesota Retired president

Education Minnesota-Retired has a new president, but Julie Jagusch is not new to union work.

After working for 36 years as an elementary and middle school math teacher in the Anoka-Hennepin School District, Jagusch wanted to continue to be active in the union and stay connected to education.

“Being involved at the local and state levels, it was hard for me to give that up,” she said. “It was important for me to continue for my personal growth, and also because I so strongly believe in public education and what’s best for our kids and our educators.”

Jagusch joined Education Minnesota-Retired after leaving teaching, but it took her a few years to get involved in leadership. She has been on the board for six years, the last three serving as vice president.

She hopes to promote the union and increase involvement from all members, especially now that all active members can sign up for retired membership at no additional cost. If you have been a member of Education Minnesota for 10 years, have retired after Sept. 1, 2015, and are eligible to receive a pension, you can be a member of Education Minnesota-Retired for no additional cost.

“We want to make sure all of our members are aware of what we’re doing and encourage them to be engaged and be an active part of the organization,” she said.

Jagusch said the union is hoping to expand its meeting schedule to include regional meetings around the state to make sure all members have an opportunity to attend and be a part of Education Minnesota-Retired.

“We want to keep members involved,” she said.

Jagusch said that because of her participation in Education Minnesota-Retired, she is much more aware of what is going on politically and how that affects herself and public education.

“We want to make sure people are aware of what’s going on with pensions,” she said. “We have meetings that help keep us up to date on things like Medicare and health services that are available to us or our aging parents.”



Julie Jagusch, Retired president with Walt Munsterman, Retired vice president

Jagusch began her role as president in April, along with a new executive board. Walt Munsterman is now vice president, Lynette Wayne is treasurer and Lowell Ueland is secretary.

For more information on Education Minnesota-Retired, go to www.educationminnesota.org/member-benefits/membership/retired-membership.

This story appeared in the June edition of Minnesota Educator Magazine, a publication of Education Minnesota.

Foundation Contribution

Education Minnesota has established a non profit, charitable organization whose purpose is to provide grant funds to members and certain other non profit 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 it's 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 Avenue
St. Paul, MN 55103**



Foundation Contributions

Contributions to Education Minnesota Foundation
from Education Minnesota Retired Members

Name(s): _____

Address: _____

City/State/ZIP: _____

Home Phone: _____ Work Phone: _____

E-Mail 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

PAC Contribution

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 \$20.00 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 Avenue
St. Paul, MN 55103**



PAC Contributions

Contributions to Education Minnesota PAC
from Education Minnesota Retired Members

Name(s): _____

Address: _____

City/State/ZIP: _____

Home Phone: _____ Work Phone: _____

E-Mail 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

June 2017

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

Phone: 651-292-4877 / 800-642-4624
Fax: 651-292-4815
Email: matt.blewett@edmn.org

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

Mark your
calendars!

- June 27-28 NEA Retired Annual Meeting—Boston, MA
June 30 - July 5 NEA Representative Assembly—Boston, MA
- July 20 - 22 AFT Teach Conference, Washington, DC
- July 31 - Aug 2 Education Minnesota Summer Seminar
College of St. Benedicts, St. Joseph
- August 7 Education Minnesota ESI Charitable Golf
Tournament
Prestwick Golf Club, Woodbury
- Sept. 11-13 Education Minnesota Retired Fall Conference
Ruttger's Bay Lake Lodge, Deerwood, MN
- October 19 Education Minnesota Retired Fall Breakfast—*Science Museum of MN*
October 19 Minnesota Educator Academy (MEA)—*RiverCentre, St. Paul, MN*

See "Calendar" on www.educationminnesota.org for additional Education Minnesota, NEA and AFT meetings, events and other information.



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