



Retired

Action Newsletter

From The President



As each election season begins, we often hear that it is “the most important election of our lifetime.” Well, this time, it certainly could be the most important election ever. There is a lot on the line for Americans, for public education, and more importantly, for our kids and grandkids. It is imperative that retirees get out and vote this year! So, gather your friends, your neighbors, and your retired colleagues. Go to your polling place and vote. Vote in the primary election in August. Vote in the general election in November. Vote. You can, and you do, make a difference!

Education Minnesota Retired has a silent army across our great state. We have almost 10,000 retirees that have often spent most of their lifetime working for kids, families and our communities. We may not be active educators in the classroom or in our schools anymore. But we can still be warriors and persistent advocates for kids, families and our communities.

Many of our state legislators are back on the ballot looking to get re-elected. It’s a great time to send them a short email or voicemail to let them know of your concerns. They want your vote. They need your vote. Just because they are not in session, doesn’t mean that we take a pause on the important work on pension COLAs (cost-of-living-adjustments), public education and the needs of our kids. As I have said before, with your help, great things have been accomplished and great things can and will get done. So, please take a few minutes once a month to get those messages sent out. Can you imagine if we had 10,000 emails sent to our state legislators every month about retiree concerns? Wow. That truly would have an amazing impact in the next legislative session!

Remember to contact your family, friends and neighbors who are educators that have recently retired or are approaching retirement next spring. Please tell them about the many benefits of retired continuous membership that they have as members of Education Minnesota. We are the only Minnesota educator retiree organization that doesn’t charge an annual membership fee. Plus, as a member of Education Minnesota Retired, they can continue with their current benefits, including liability insurance as a day-to-day substitute.

With Labor Day right around the corner, let’s take a little time for our own self-reflection for all of those who came before us in the labor movement. It’s because of their hard work, persistence and dedication that we are who we are today. For that, we sincerely thank them and you, for making our communities and our world a better place to live.

Finally, a couple of personal reminders. Remember that each day you have the opportunity to make someone’s life a little better. Give a kid an open ear to truly hear their voice. Give your neighbor a handshake. Give family and friends a nice Minnesota goodbye as they leave your home. You can do a lot of giving and it’s all free. As Robert Louis Stevenson once said, “Don’t judge each day by the harvest you reap but by the seeds that you plant.”

The very best of wishes, my friends.

Yours In Solidarity,

Wes

Education Minnesota PAC Board

Sue Witt serves on the Education Minnesota PAC Board representing retirees as a non-voting member. The PAC Board chooses a focus for the year, votes on endorsements recommended by local screening teams, and receives legislative updates and polling information which informs financial decisions.

The revenue is largely from active member dues. Retired members are encouraged to donate at least \$20 per year to the fund and forms are included in the newsletter.

Education MN Retired does not endorse, but you are eligible to serve on a screening team if you have donated. You can contact a local in your area or Education Minnesota Public Affairs.

To be endorsed by Education Minnesota, the candidates for house, senate and statewide offices must complete a 35-question form. Then the candidates must meet with the local screening team. Endorsement recommendations from the local committees are sent to the PAC Board for final decision. Statewide candidates are screened by the whole PAC Board.

Locals can also receive support for school board races and referendums. Stipends are given to teachers for coordinating phone banks and volunteers.

We would encourage you to donate to the PAC fund each year to support candidates, who support public education.



Contributions to Education Minnesota PAC—Education Minnesota Retired Members

Name _____

Address _____

City/State/ZIP _____

Home/Cell Phone _____ Email _____

I am eligible to vote in the United States. Yes No

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

Return this form and your contribution to 41 Sherburne Ave. St, Paul, MN 55103

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



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 who are eligible to vote 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 the Education Minnesota Public Affairs Dept. at 800-652-9073.

Education Minnesota Retired Annual Meeting

By Myrna Doran



The Education Minnesota Retired Annual Meeting was held on Friday, April 19. The meeting included the State of the Union by President Wes Tessman, committee reports, the certification of the election results, and the installation of the new officers and directors by Education Minnesota Vice-President Monica Byron. Education Minnesota Retired has almost 10,000 members!

Presentations included:

- Legislative and pension update
 - “Why is it so hard to talk about race?”
 - Updates from Jay Stoffel, TRA, Doug Anderson, PERA, Erin Leonard, MSRA and Phillip Tenick, SPTRFA
- Members present donated \$490 for the Jack Kinnamon Scholarship for Aspiring Educators and \$340 for the Quad Cities Food Shelf on the Iron Range. Education Minnesota Retired selects food shelves from across the state for these donations.



Member Survey

The Education Minnesota Retired Communication Committee sent out an interest survey along with our last ballot for officers, directors and delegates. Thank you to the 1,569 members who took the time to complete this survey. This information will be very helpful for the leaders of your organization to plan the work of the organization.

Members sending information to us range in age from younger than 55 to almost 105 with the majority in the 66 to 85 age range. The majority responding were female and living in Minnesota.

Topics most important to members by priority are pensions, Social Security, health insurance, Medicare and Medicaid, senior fraud and scams, legislative issues and current education issues. Your organization will continue to utilize this information to address the issues important to you the members. Thank you again to responding to our survey. If you have additional concerns that need to be included, please send these issues to: doranmm@comcast.net. Myrna Doran, Communications Committee Chair

Minnesota TRA Board of Trustees Representative Report

By Mary Broderick



The purpose of the TRA defined-benefit pension plan is to provide retirement, disability and survivor benefits for all eligible members for the rest of their lives. The TRA Board owes a Constitutional fiduciary duty to active, deferred, and retired members of the plan, the taxpayers of Minnesota, and the State of Minnesota. The trustees owe a duty of loyalty to ALL TRA participants, not specific subsets such as actives, retirees, or employers. Our primary duties are to provide authorized benefits and to protect the financial stability and integrity of the pension fund. The TRA Board of Trustees met most recently on Wednesday, June 12, 2024. Here are items of interest from that meeting.

- The Board recognized Martha Lee (Marti) Zins for her 34 years on the TRA Board, with 14 of those years as President. Marti's contributions, expertise, leadership, and dedicated service to both active and retired educators and our defined benefit pension plan is greatly appreciated! Marti was at the meeting, and she is doing well.
- After an interesting election procedure, Joel Stencel, representing the Minnesota School Boards Association, was chosen to continue as TRA President for the upcoming year.
- David Rondestvedt, representing active teachers, will serve as Vice President.
- TRA Executive Director Jay Stoffel announced at the meeting that he will be retiring in a few months after 45 years of work in public pensions. Jay has been the Executive Director of TRA since 2017.
- The Board reviewed the results of their annual self-evaluation process. Several areas of our work and responsibility arose in that process as topics needing further training, planning, and attention. The Board will hold two days of educational meetings in September focused on goal-setting and planning for the upcoming year and next legislative session.

Join us for the 2024 Education Minnesota Retired Fall Conference

Sept. 16-18 at Chase on the Lake

Enjoy the rustic and scenic Chase on the Lake while networking with fellow Retired educators. The agenda includes:

- Election update by Secretary of State Steve Simon
- History of Education Minnesota Retired
- State Demographer: seniors in Minnesota
- TRA and PERA updates
- Finances for seniors
- Social Justice
- Travel tips
- Loons by the DNR

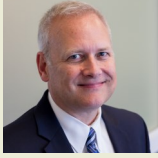
Conference registration, registration fee and booking a room at Chase on the Lake are all separate. The conference registration is \$45/pp, payable by check or card at the conference. Register for the conference at www.cvent.com/d/5qgg45. If you are unable to register online, please contact Stephanie Berg at 651-292-4877.

You will need to call Chase on the Lake at 1-218-547-7777 to book your room. Please use group block #168824 to receive the group room rate.

- Double queen and king rooms \$129/night and includes breakfast, lunch and dinner.
- Resort check-in begins at 5 p.m. and check-out is 12 p.m.

PERA Update

By PERA Executive Director Doug Anderson



The 2024 legislative session was relatively quiet for PERA. There were no significant changes for General Plan members. The Plan is relatively healthy compared to most statewide plans across the nation. As of July 1, 2023, the Plan had an 83% funding ratio, projected to improve to 100% by 2041.

The July 1, 2024 actuarial valuation results will be available in October. PERA expects the 2024 results to be better than previously expected. The results will reflect a favorable investment return for the fiscal year ending June 30, 2024. The actual return is not yet available but is certain to be in excess of the 7.0% assumption. The Plan will also see a favorable adjustment resulting from demographic assumption changes recommended by our actuary and approved the Legislative Commission on Pensions and Retirement.

PERA's Board has identified that improving retiree inflation protection is a plan priority. However, it must not compromise progress towards a fully funded Plan or by increasing employee and employer contributions. The Board will continue to monitor and balance these conflicting priorities. Please stay tuned to our website and newsletters for more information as it becomes available.

Thank you, Jay Stoffel



Minnesota TRA's Executive Director, Jay Stoffel, announced his retirement at the June TRA Board meeting after working for 45 years in the financial world.

Jay has worked for TRA since 2014, first as a deputy director, then as executive director from 2017 to the present. Jay previously worked for the Duluth Teachers Fund Association from 1992-2013. He also brought financial experience from working at the Minnesota Public Employees Retirement Association and the Office of the Minnesota Legislative Auditor.

Jay's retirement plans include golfing, boating and spending time with his wife and grandchildren.

Congratulations to Jay on his retirement! Education Minnesota Retired leaders have enjoyed working with him and always found him more than willing to answer questions, speak to members at our events and

Education Minnesota Foundation Golf Tournament

The 30th Education Minnesota Foundation Golf Tournament will be held on August 12, 2024 at Prestwick Golf Course in Woodbury. We are sponsoring 2 teams. Those selected to golf are Kelly Wilson, Sue Wagner, Young Sill Kim Allgor, Jeanne Brown-Kruesel, Timothy McInnis, Deb Holder, David Holder, and Barbara Farley.



Save the date!

Retired Fall Breakfast

October 17, 2024

St.Paul Rivercentre

All Minnesota House Representatives are up for election

By Joan Beaver



Have you heard that there is an election in November? Yes, a couple candidates are running for President, which is important. In addition, Congressional representatives will be elected. But there are other elections you may not have heard much about. For Retired educators in Minnesota, the election in every single House district is also very important.

Unlike the campaigns for President, there is a very good chance you will have an opportunity to personally interview candidates who want to represent you in the state legislature. And it is the Legislature that determines nearly all facets of public pensions. A handful of members of the House and the Senate, from both major parties, serve on the Legislative Commission on Pensions and Retirement (LCPR) and are the experts who propose detailed bills about pensions.

However, all members of the Legislature can influence pension policies and vote on the bills proposed by the LCPR. It's important for candidates to hear your concerns about the issues most important to you. So when a candidate for the Minnesota House knocks on your door or calls on the phone, or leaves a card inviting you to get in touch, take the opportunity to advocate for your needs and the needs of Minnesota students.

A few questions you might ask that would also inform the candidates:

- Do you believe that strong pensions are important for teacher recruitment and retention?
- What will you do to promote Cost of Living Adjustments (COLAs) to fulfill the state's promise of pension benefits that will maintain their value? Tell them how inflation has impacted your life.
- What is your position on funding for public schools?

No matter what your feelings may be about the top of the ticket, get the information you need to make an informed choice for House Representative. It isn't only the President who will make policies affecting your life.

Education Minnesota Retired Governing Board

Wes Tessman	President	Myrna Doran	District 5 Director
Sharon Kjellberg	Vice President	Robert Astrup	District 5 Director
Dan Larson	Secretary	Bob Nystrom	District 6 Director
Jayne Schwalbach	Treasurer	Susan Witt	District 6 Director
Julie Jagusch	Past President	Roger Josephson	District 7 Director
Diane Larson	District 1 Director	Vacant Vacant	District 7 Director
Cathy Stringfield	District 1 Director	Roberta Margo	District 8 Director
Wes Hanna	District 2 Director	Kathy Hegstrom	District 8 Director
Jeannie Ness	District 2 Director	Jeanne Brown-Kruesel	At Large
Janet Kujat	District 3 Director	Walter Munsterman	At Large
Elaine Rothman	District 3 Director	John Lipke	At Large - ESP
Joan Beaver	District 4 Director	Chuck Lyons	At Large - Higher Ed
Judy Rohde	District 4 Director		

NEA-Retired Annual Meeting and NEA Representative Assembly

By Bobbie Margo



The 41st NEA Retired Annual Meeting was held on June 30-July 1, 2024, at the Sheraton Hotel in Philadelphia, PA. As of June 30, 328 delegates had registered with 313 delegates in actual attendance.

The first general session ended with our own Judy Rohde presenting a “Moment of Remembrance.” Business over the next two days included: new business items, Bylaws, the PAC Fund overview and the Jack Kinnaman Scholarship Program. NEA Retired gave five \$3,500 scholarships this year.

Our own Education Minnesota Retired affiliate received two first-place awards for largest percentage increase of membership and largest numerical increase in membership.

The RAM ended with a legislative update from Mary Kusler, Senior Director, NEA Center For Advocacy. Kusler reminded us that President Biden is the most pro-labor, pro-public education President that we have ever had in office.

The RAM adjourned on July 1 and the Education Minnesota Retired delegates moved to a different hotel.



The NEA 162nd Annual Meeting and the 103rd Representative Assembly were called to order on July 4 at the Philadelphia Convention Center. There were 5,570 members registered as delegates. The first day was filled with new business items. Education Minnesota has been working very hard to pass an NEA Constitutional amendment to increase the number of delegates granted to Minnesota. This would modify what is presently granted to our state because of our status as being a merged state. This vote is done by secret ballot and requires 2/3 to pass.

Throughout the convention business, there had been an impending threat of a strike by NEA Union Staff. By 9 a.m. on July 5, we were told to pack up our things in the convention center as a strike had been declared and crossing a picket line was certainly not an option. All delegates will receive information to vote by mail and be informed of the status of any other business items not completed.



On behalf of Jeanne Brown-Kruesel, Sharon Kjellberg, Diane Larson, Judy Rohde, Jayne Schwalbach, Kathy Stringfield, Wes Tessman, Sue Wagner, Kelly Wilson, and myself we sincerely thank you for giving us the opportunity to represent you at the national level. We are honored to have been able to represent you with professionalism and with pride.

Watch for a special email blast announcing the launch of a new Education Minnesota Retired website!



Retired

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August 2024

Education Minnesota Retired

41 Sherburne Ave.

St. Paul, MN 55103

Phone: 651-292-4877

Calendar of Events

- August 5 Retired Governing Board Meeting
- August 12 Education Minnesota Foundation Golf Tournament
- August 13 Primary Election Day
- September 16-18 EdMN Retired Fall Conference, Chase on the Lake in Walker, MN
- September 20 Early Voting Begins for the General Election
- September 22 MN State AFL-CIO Retiree State Convention
- October 17 Retired Fall Breakfast at St. Paul RiverCentre
- November 5 General Election Day
- November 11 Retired Governing Board Meeting
- November 12 MN/WI Retired Border Conference

“The ultimate measure of a person is not where one stands in moments of comfort and convenience, but where one stands in times of challenge and controversy.”

Martin Luther King, Jr.

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

