



Retired

# Action Newsletter

## From the president



As I look back and think of everything that Education Minnesota Retired has done since our June edition of the Action newsletter, I find it amazing and a bit of a whirlwind. In late June and early July, we had 10 delegates at the NEA Retired Annual Meeting as well as the NEA Representative Assembly, in Orlando, Florida. We had two more Retired Governing Board meetings in August and November. In

September, we had several members attend regional meetings, one in Windom and one in Rochester. Several Governing Board members also attended the Minnesota Retiree Council, AFL-CIO, Biennial Convention, in St. Paul. In October, we held the Fall Breakfast during MEA and heard about the importance of school board elections. In November, it was Minnesota’s turn to host the MN/WI Retiree Conference. We had several great speakers and sessions, including a roundtable discussion on retiree concerns, led by NEA-Retired President Anita Gibson. The keynote event was a presentation by The Raptor Center, from the University of Minnesota. Thank you for your participation at several of these activities.

I want to encourage you and our Education Minnesota Retired colleagues to join us in our many events and activities. Certainly, the biggest concern for many is their pensions. During the last legislative session, there was a lot of progress made. However, there is still more that needs to be done. Once again, Minnesota has a budget surplus, so now is the time to speak up to have our voices heard. If you’d like to help yourself, help other retirees and help your union brothers and sisters, make a statement the importance of pension by attending the Pension Rally in February.

### **Pension Rally**

- February 29
- Minnesota Capitol Rotunda, St. Paul
- 3:45-4:45 p.m.

As I asked you last June, please become active again. You, as much as anyone else, can be a positive voice for change. Just like those days when you were working in school, you can and do make a difference, each and every day.

Please remind your family and friends that are active members of Education Minnesota and are retiring about the benefits of continuous membership. It takes less than two minutes to sign up. Plus, we are the only state retiree organization that doesn’t charge members an annual membership fee. Getting liability insurance for short-term substitute teachers is one of the many benefits.

Finally, on a personal note, it’s that time of the year when you can toss a snowball at the neighbor kid every once in a while. Watch their face light up and see what kind of reaction you get from them. Listen carefully. Look in their eyes. These interactions and so many more will let a child know just how much you care about them and that they are important. It’ll warm your soul much faster than a cup of hot cocoa.

The very best of wishes, my friends.

Yours In Solidarity,

Wes

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## Education Minnesota Retired Governing Board

Wes Tessman	President	Myrna Doran	District 5 Director
Sharon Kjellberg	Vice President	Pixie Pixler	District 5 Director
Jayne Schwalbach	Secretary	Bob Nystrom	District 6 Director
Bob Millette	Treasurer	Susan Witt	District 6 Director
Julie Jagusch	Past President	Roger Josephson	District 7 Director
Cathy Stringfield	District 1 Director	Vacant	District 7 Director
Diane Larson	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
Dan Larson	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		

### Something to think about!

#### Dictionary Definitions - Respect diversity

Respect for diversity means understanding and valuing the differences between people, cultures, religions, races, etc. 1. It means accepting everyone for who they are, and not judging them based on their differences. 2. Respect for diversity goes beyond tolerance and understanding to actively acknowledge and promote the equal worth of peoples with condescension. 3. Appreciating diversity includes understanding dimensions of diversity and how to work within diverse community context, but also includes a consideration of how to work within systems of inequality. 4. It is important to learn from people who are different from us, avoid using stereotypes, and recognize and address our own biases.

# Education Minnesota Retired Committees

## **Mission Statement**

Education Minnesota Retired provides a united voice for retired educators of Minnesota. We will advocate on behalf of members for issues important to retirees, such as pensions, health care, public education, and other legislative issues through community engagement, organizing and political activism.

## **Education Minnesota Committees**

Members, our governing board consists of 25 voting members. We can't do it all ourselves. We need your help to move our organization forward! Please consider becoming involved in one of our committees. You will be a valuable asset to our organization and also be able to spend time with your fellow retirees and former colleagues. Meetings are held at the Education Minnesota building in St. Paul, and we will pay mileage for those who attend. Please consider joining one of these committees by contacting Stephanie Berg at [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org) or 651-292-4877. There are both standing and special committee options.

### **Membership Committee**

- Responsible for the recruitment of members
- Judy Rohde, Chair

### **Government Relations/Legislative Action Committee**

- Responsible for submitting legislative goals to Retired
- Works closely with the Education Minnesota Legislative Action Committee
- Monitors issues important to retirees and public education
- Joan Beaver, Chair

### **Statements of Principle Committee**

- Statements of Principle are the guiding values of our organization
- Review and submit an changes to the Retired members
- Jeanne Brown-Kruesel, Chair

### **Nominations and Elections committee**

- Establish process and timeline for local elections
- Reviews nomination submissions and ballots
- Conduct the election for Retired officers, directors and delegates
- Jayne Schwalbach, Chair

### **Communications committee**

- Creates plan to connect with Retired members including newsletters, web sites, e-mail
- Myrna Doran, Chair

### **Program committee**

- Plans programs and events for members, such as conferences and seminars.
- Lois Wendt, Chair

### **Finance Committee**

- Consists of the Executive Committee and one director elected by the Retired Governing Board
- Develops the annual budget for Retired
- Bob Millette, Chair

### **Constitution and Bylaws committee**

- Reviews CBL annually
- Recommends needed updates or changes to the Retired Governing Board
- Walt Munsterman, Chair

### **Local Chapters committee**

- Assist in organizing local chapters across the state
- Provides local chapter support with grant opportunities
- Wes Hanna, Chair

### **Grant committee**

- Create and submit grants for special projects to NEA and AFT
- John Lipke, Chair

### **Regional Meetings committee**

- Organize regional member meetings across Minnesota
- Create an agenda that includes presentations by members
- Sharon Kjellberg, Chair

### **Social Justice committee**

- Review events, policies and structures with an equity lens
- Recommend needed changes to move our organization toward more racial equity and diversity
- Chuck Lyons, Chair

# NEA Board of Directors

By Judy Rohde



This past summer at the NEA Retired Annual meeting, held just before the NEA RA in Orlando, I was re-elected to continue to represent NEA Retirees for another term on the NEA Board of directors (BOD). I am one of six retired members to serve on the 170 member NEA BOD to represent NEA Retirees. I will serve for three more years. Next to the NEA Representative Assembly, the NEA BOD is the highest ruling body for NEA. We meet four times a year in person in addition to numerous virtual meetings.

## Lobbying on The Hill

Before each NEA BOD meeting in D.C., we lobby all of our Minnesota representatives and senators. The most current issues we have lobbied on include:

- Support the Equality Act
- Invest in helping all our students succeed
- End unfair GPO/WEP penalties & strengthen Social Security for all

## Children impacted by war

NEA has been working with and through Education International (EI), the global union federation of educator unions, to speak out about the impact of this war on the children of the region and around the world. NEA is a founding member of EI and its largest organization. EI is the only global union federation in the world that has member organizations in both Israel and Palestine.

NEA believes that all people, no matter their religion, spoken language or place of birth, have a fundamental right to live free of violence and war. The horror of what Hamas terrorist did can never be justified.

## Watch for it – The film “Radical”

The NEA BOD was given an opportunity to see a special screening of a new movie: “**Radical**”. The movie is both inspiring and heartbreaking simultaneously. The stars of the film are the children who are inspired by an educator who teaches them not just the curriculum or how to pass the test, but how to think and believe in themselves.

## From the NEA General Counsel – Alice O’Brien

NEA is involved in making sure educators have the right to teach honest history and fight for educators’ right to teach curriculum that reflects our students. NEA defends teachers who face severe disciplinary consequences, including termination, for teaching critical thinking skills and empathy. General Counsel O’Brien highlighted the NEA’s commitment to ensuring educators are paid a fair, living wage and have the necessary accommodations they need.

## American Indian/Alaska Native Observance

During this observance, key points were made:

- 92% of native students are in public schools
- A challenge is to find and preserve native language
- The native language got us out of two world wars
- We need to help students to be comfortable to be themselves

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Education Minnesota  
Retired Gives Back!

- Donate school supplies
- Donate to food banks
- Assist funding scholarships
- Gather paper bags for food shelves

# Legislative Action Committee

By Joan Beaver



As you probably know, the Legislative Commission on Pensions and Retirement (LCPR) makes recommendations to the full Legislature where decisions about public pension benefits and contributions are made. Two significant changes made to TRA during the 2023 session:

- Lowered the Normal of Age of Retirement to 65 beginning in 2025
- Added a 1.4 percent one-time payment in 2024, in addition to the 1.1 percent Cost of Living Adjustment (COLA) already in statute.

It is significant that the LCPR has held meetings during the interim to prepare for the 2024 session; it suggests that they see a serious need for change. Active members have been letting them know how unhappy they are with requirements for full pension benefits.

In 2018, the TRA fund looked unsustainable and the LCPR put together a bill to preserve the defined benefit system we have for future retirees. It included:

- Reduced TRA COLAs to one percent each of the next five years
- Increased COLAs each of the following five years by .1 percent
- Raised some employer and employee contribution rates

At that time, inflation was running about two percent annually but we retirees supported the bill in order to preserve a defined benefit pension for future retirees.

Retired advocates heard assurances in 2018 that COLA changes might need to be reconsidered during the next 10 years, if circumstances changed. Circumstances have changed. Since 2020, inflation rates are much greater than two percent (Social Security COLA for 2023 was more than eight percent.) State revenues had a very large surplus last year, and state revenue forecasts for 2024 are also running significant surpluses

Those who retired before and since 2018, have suffered huge losses in the value of TRA benefits. Current law caps COLAs at 1.5 percent in 2028 and inflation continues to run well above that rate. While the one-time bonus payment we will receive in 2024 will help and is appreciated, it will not be added to the base to calculate future COLAs.

If you care about the value of your pension benefits going forward, you need to speak up. Talk to Legislators who go to St. Paul in February, and watch for emails and newsletters from us about:

- Meetings of the LCPR.
- Attend the Education Minnesota Political Conference on February 2-3.
- The Retired Legislative Conference (sometime in March)

## Education Minnesota Retired Local Chapters - Owatonna

By Diane Larson

The Owatonna Retired Area Education Association (OAREA) has over 70 members enjoying monthly meetings for socialization and business. Guest speakers are invited 3 times a year. In September, a speaker from the Memory Cafe at the Steele County History Center described their successful Alzheimer support program. In October, the Owatonna Foundation gave community business growth and development updates. In July, over 60 retired members received guided tours of the new school.

Our Owatonna Superintendent Elstad will update our group in January about the how the technology community is supporting the newly built Owatonna High School and its enhanced program offerings. For the May 2024 program, recently retired teachers will share teaching changes in the last five years.

Again this year, the OAREA will deliver hats, mittens and gloves to our elementary schools so the social workers give these to needy students. For numerous years we have received grants from REAM, the Expedition Credit Union and donations from our members to fund this yearly worthwhile donation.

## Minnesota AFL-CIO Retiree Council



The MN AFL-CIO Retiree Council held its conference, “2023: Eyes on Healthcare”, on September 27, 2023, at the Sheetmetal Workers Hall in Maplewood.

The morning agenda began with the Twin Cities Labor Chorus, and opening remarks by Brad Lehto, Secretary-Treasurer of the Minnesota AFL-CIO. Next was a panel presentation and discussion on the perils of public health program privatization. Panel members included Senator John Marty (40 DFL), Representative Peter Fischer (44A DFL), Rose Roach, National Coordinator for

the Labor Campaign for Single Payor and Chair of Healthcare for All MN (via Zoom). This was a very informative presentation and discussion, with questions entertained from conference attendees.

After lunch other presentations and reports included:

- Accomplishments of the 2023 Minnesota Legislature for seniors
- State Retirees Council election 2024 work plan
- Committee and task force reports

After door prize drawings, State Retiree Council officer and board elections were held, convention officials and committee chairs were appointed and ratified, and two resolutions were discussed and passed: supporting the United Auto Workers and establishing a Silver Alert program in Minnesota.

Officers elected were:

- President - Ken McInnis
- Vice President - Louise Sundin
- Treasurer - Russ Thornell
- Corresponding Secretary - Lois Wendt
- Recording Secretary - Wes Volkenant



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### Hispanic Observance

During this observance key points were made:

- 63.7 million Latinos live in the US – 19.1% of the total population. 1 of 4 students are Latino.
- 31% of all college students come from immigrant families. 68% of all Latino students are from immigrant families.
- New Mexico has the highest Hispanic population.
- Working with immigrants, you don’t always get it right but you have the power to change.

### How can you help our educators and students?

How can you help our active educators in our schools? Be a substitute teacher or support staff. With your NEA/Education Minnesota Retired membership, you are covered with liability insurance as a day-to-day sub. If you have any questions or comments about NEA, please contact me at [judyrohde@gmail.com](mailto:judyrohde@gmail.com) or 651-483-5628. I am honored to represent you on the NEA BOD.

# Education Minnesota Retired Internal Elections

By Jayne Schwalbach



The nomination process has started for the Education Minnesota Retired Governing Board, the Education Minnesota Representative Convention in April, and NEA-Retired Annual Meeting/NEA Representative Assembly in Philadelphia, Pennsylvania. Nomination forms are available in this newsletter and are due by Friday, December 29, 2023.

Completed Nomination forms may be mailed or emailed to the Education Minnesota Retired office. Directions are on the bottom of the nomination forms.

Ballots will be mailed out in February. Please fill it out and place it in the mail as soon as possible. All ballots are due by March 1, 2024. The results will be posted in mid-March.

The officer positions on the Governing Board open this year are Secretary and Treasurer. The district positions on the Governing Board open are districts 1, 3, 5, 7 and one At-Large position. The map shows the district boundaries.

Delegates to the Education Minnesota Representative Convention and the NEA-Retired Annual Meeting/NEA Representative Assembly, will have funding available to cover expenses to attend them. The Governing Board meets four times a year plus the Annual Meeting in April. Governing Board members are also expected to serve on committees.

If you have any questions, please contact Jayne Schwalbach at [jschwalbach26@gmail.com](mailto:jschwalbach26@gmail.com) or Stephanie Berg at [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org).

## Membership Update

By Judy Rohde

Beginning with the 2015-16 school year, active Education Minnesota members who are 55 years of age or older, have at least 10 years as a member of Education Minnesota (does not have to be continuous), qualify for a public pension and were an active member at the time of retirement should qualify for retired membership at **no additional cost**. However, membership is not automatic, **retirees must register for the retired membership**. There are many retirees who meet the qualifications for continuous membership but have not registered. Do you know any of these retirees? Please ask them to register online at <https://educationminnesota.org>.

By staying connected to the union, retirees have access to professional development and member benefits including NEA life insurance they may have purchased. In addition, retirees who do day-to-day subbing will continue to have liability insurance under the retired membership. Retirees are also a vital part of the union as we continue to fight for full funding of public education and improvements to our pension.

If retirees do not meet the continuous membership qualifications, they can join through a paid membership. Currently a paid retired membership is one-time fee of \$350 for teacher and \$275 for ESPs. If you have any questions, please contact Stephanie Berg at [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org).

### By The Numbers

- Education Minnesota Retired membership as of October 1: 9,512 members
- NEA Retired membership as of September 11: 322,970

## TRA Update

By Myrna Doran

### Replacement process for the retiree representative on the TRA Board of Trustees

The TRA Board of Trustees is seeking a candidate to fill the retiree representative vacancy on the Board.

Candidates must be a retired member of TRA and submit a completed application to TRA by 4:30 pm on Friday, December 1. The Board will have a special board meeting to appoint a candidate on January 2, 2024. The new trustee's term will begin at the January 17 Board meeting. For additional information about this position, please consult the TRA webpage: [minnesotatra.org](http://minnesotatra.org).

At its meeting on Monday, November 13, the Education Minnesota Retired Governing Board voted a 'recommendation of support' for the appointment of Mary Broderick to complete the term on the Board of Trustees vacated by Marti Zins. Mary had served on the TRA Board as an active teacher. So, she has the experience and knowledge to step in immediately to represent our retired educators.



#### Marti Zins

Special thanks are given to Marti for her many years of service on the TRA Board as well as her work with the Minnesota Education Association. She has been very dedicated and given so much time and energy to help educators. Best wishes for a very speedy recovery are sent to Marti Zins! Her home caught on fire and she was injured. She had been in an ICU burn unit. Recently, she was moved to a rehab center. Because of the extent of her injuries, she has chosen to resign from her position on the TRA Board where she has served as its Chair for many years.

## AFT Retirees Program and Policy Council

by Walt Munsterman

AFT Retirees Program and Policy Council (PPC) works with growing membership as well as mentoring active groups and affiliates with the hope that together retirees and in-service members can work for progressive causes, electoral campaigns, government and school issues and the endless stream of needs waiting for greater engagement and union advocacy.

### Retirees PPC Subcommittees:

- **Organizing Mobilization and Member Engagement**

Coordinates organizing and engagement in a way that prepares for virtual and in-person mobilization while growing membership, communication and unity at the national level.

- **Political Action and Legislation**

Organizes and engages the AFT membership to take legislative and political action to preserve and improve Social Security, Medicare and pensions by becoming aware of the continuing pressure to diminish these necessary programs for retirees rather than improving them and advocating for a secure retirement for all.

- **Human and Civil Rights**

Works to secure the rights of all our members, regardless of identity, and defend against attempts by outside entities to try to take rights away.

- **Legacy Fund**

Charged with researching and establishing protocols for sustainably funding retiree-led programs and initiatives for future generations of retired members!

- **Healthcare Fund**

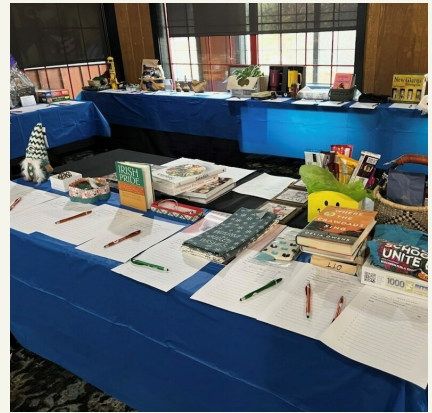
Represents the interests of our healthcare for retiree members and makes recommendations on health-care related issues.



# Minnesota / Wisconsin Retired Conference

By Sharon Kjellberg

For the past 5 years, Education Minnesota Retired has been involved in a conference with Wisconsin Retired Educators, alternating the hosting of this event. This year was our year to host the conference. The conference was held at the Holiday Inn Lake Elmo, on Tuesday, November 14, from 9:45-3:00. Approximately 75 people were in attendance. We began with a continental breakfast and a mix and mingle. A silent auction was set up for bidding all day with the proceeds of \$1,844 collected going to the NEA Fund for Children and Public Education. There was also a large collection of food items and \$370 for the Becker County Food Pantry, paper grocery bags for a local AFL-CIO sponsored food shelf, and donations of \$400 for the Jack Kinnamon Scholarship fund to be awarded to an aspiring educator.



Welcome speeches were given by Ed MN Retired President, Wes Tessman, WEAC Retired President Tom Zigan, Education MN Vice President Monica Byron, Ed MN Secretary-Treasurer Rodney Rowe, NEA-Retired President Anita Gibson, and NEA Board of Directors Judy Rohde.



Two sessions of breakout presentations were included in the day. These presentations included a roundtable on retiree concerns (Anita Gibson, NEA- Retired President); Senior Financials (Kent Schutte, EFS), Why is it so hard to talk about race? (Matt Ryg, ED MN staff); Cultural Appropriations (Dan Larson, Education Minnesota Retired board members); Travel Tips (Judy Rohde and Myrna Doran, Education Minnesota Retired board members)

Of course, there was lunch served with lunchtime remarks by Bernie Burnham, Minnesota AFL-CIO President, who was a former teacher, president of the Duluth Education Association, and vice president of Education Minnesota.

The keynote event was an amazing presentation by the Raptor Center, from the University of Minnesota.



# 2023-24 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)

Secretary (1 position)

District 5 (2 positions)

Treasurer (1 position)

District 7 (2 positions)

District 1 (2 positions)

At Large (1 position)

District 3 (2 positions)

Please use the map attached to the nomination form to find  
your district.

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

Education Minnesota Representative Convention (4 Delegates)  
April 19-20, 2024

NEA Retired Annual Meeting & Representative Assembly (10 Delegates)  
NEA Retired Annual Meeting, June 29-30, 2024  
NEA Representative Assembly July 3-7, 2024  
Philadelphia, PA

Please see reverse side of this form for statement and election guidelines.

## Nomination Statement

On a separate sheet of paper, in 80 words or less, please indicate why you are running for each chosen position. If more than 80 words for each position are submitted, the nominations committee reserves the right to edit.

### Election Guidelines

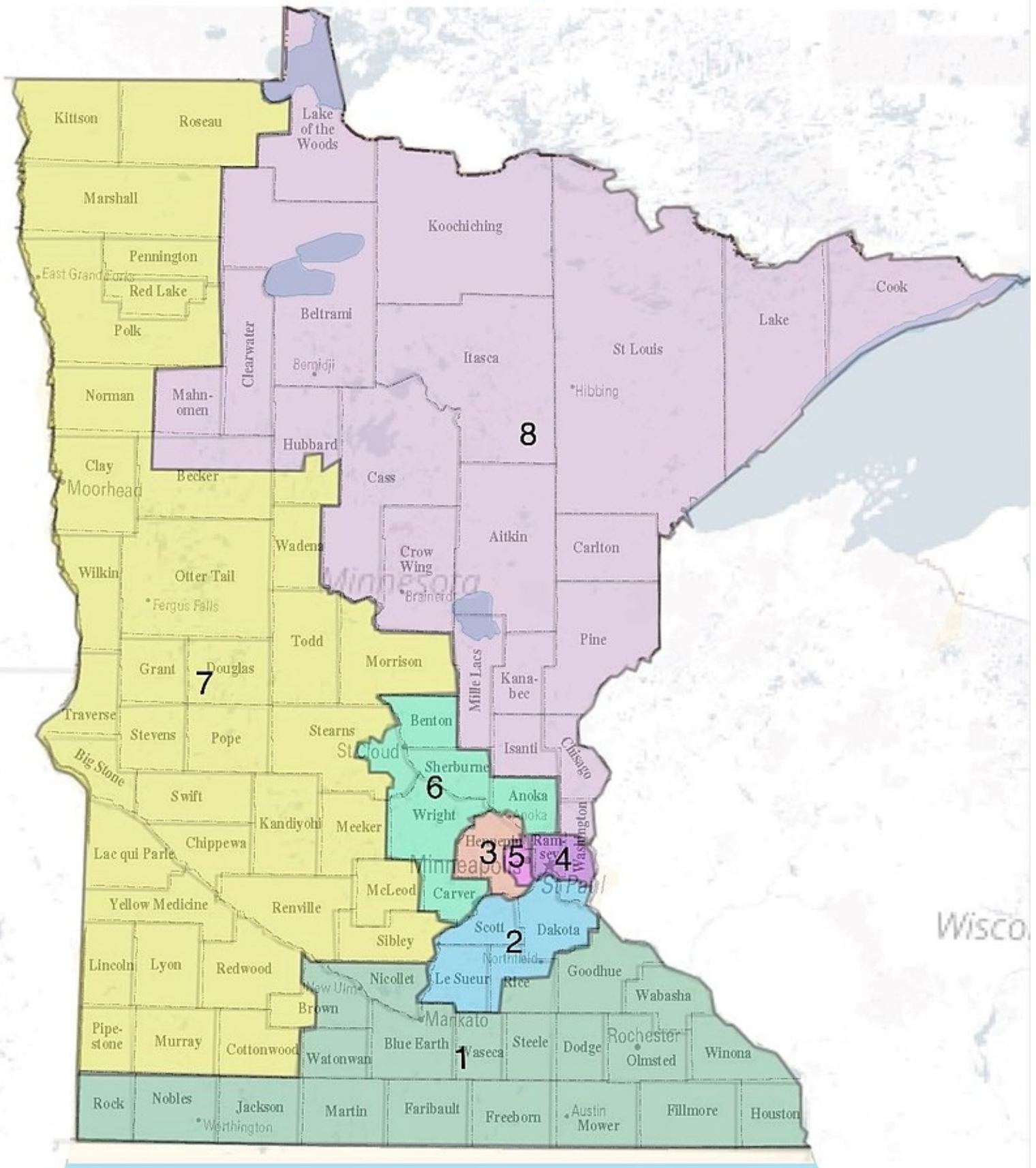
- Elected candidates will assume office immediately following the Education Minnesota Retired Annual Meeting on Friday, April 19, 2024
- Nominations must have the permission of the person whose name is being submitted for election.
- Nominees are required to attend all meetings at the conferences and events for which they are elected. Nominees to the Retired governing board are expected to attend all board meetings and the Retired annual meeting.
- Delegates to the NEA Retired Annual Meeting & NEA Representative Assembly will be reimbursed for expenses per the Retired finance policy. Any expenses not covered by the Retired finance policy 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 postmarked by Dec. 29, 2023 to:  
**Education Minnesota Retired Nominating Committee**  
**41 Sherburne Avenue, St. Paul, MN 55103-2196**
- Nomination forms and digital photos may be submitted electronically to [stephanie.berg@edmn.org](mailto:stephanie.berg@edmn.org) by Dec. 29, 2023.
- Photos and statements of each candidate will be included with the ballots that will be mailed the week of Feb. 5, 2024.
- 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

- Dec. 29, 2023 Nomination form **and picture** must be returned, postmarked or electronically received on or before December 29, 2023.
- Feb. 5, 2024 Ballots will be mailed to Education Minnesota Retired members the week of Feb. 5, 2024.
- Mar. 1, 2024 Ballots must be returned, postmarked on or before March 1, 2024, to:

#### **Education Minnesota Retired Elections**

41 Sherburne Ave.  
St. Paul, MN 55103



## Education Minnesota Retired Fall Breakfast

By Bobbie Margo



The Education Minnesota Retired Fall Breakfast was held on Thursday, October 19 from 9-11:00 a.m. at the St. Paul RiverCentre. This event is a wonderful activity to attend. For a very low price, it includes a full breakfast, updates on current political issues from Education Minnesota staff and time to network and to visit with other Education Minnesota Retired colleagues.

A “welcome” was extended by President Wes Tessman. Around 30 members in attendance introduced themselves as well. Education Minnesota staff shared the importance of the upcoming school board elections which will be occurring throughout the State. Unfortunately, a toxic ideology sweeping across the country that wants to deny students the freedom to learn and be themselves and to take away educators’ tools has landed here in Minnesota. One group, Moms for Liberty, has called for removing mental health care from schools. Another, the Minnesota Child Protection League, spreads homophobic conspiracies targeting schools and educators. These groups are funding and endorsing candidates in school board races statewide. Together, we can raise our voices as Minnesotans and vote for candidates that will defend our students’ freedom to learn an honest history of the United States, both the good and bad, and their freedom to be safe and welcome as their authentic selves in their local public schools.

Retiree Jeanne Brown-Kruesel serves on the Education Minnesota Pension Advisory Group. She gave a presentation on what the group is working on and the health of Minnesota’s TRA. Quality teachers and qualified education personnel will not remain in the Minnesota education work force if the profession does not have quality pay and benefits.

Education Minnesota Secretary Treasurer Rodney Rowe also spoke on the health of educators in today’s Minnesota schools.

The breakfast ended with a drawing for door prizes. Plan to attend the Education Minnesota Retired Breakfast in October 2024. There will be a delightful breakfast, informational speakers and plenty of retiree bonding. See you there!

## NEA-Retired Communications Committee

By Bobbie Margo

The first virtual meeting of the NEA-Retired Communications Committee was held on October 10. The committee is part of the NEA-Retired Executive Council and is chaired by Bobbie Margo. There are over 35 members from throughout the country, including Education Minnesota Retired communications chair, Myrna Doran. The committee will meet virtually 3 times during the year.

The agenda consisted of information which would help committee members better organize communication strategies within their own state retired organizations. Members were encouraged to share in the chat, their means of communicating to their state retired membership.

There were several communications topics, including a presentation on Building Your Digital Toolbox.

Discussion items included:

- Building a digital organizing strategy
- Knowing one’s audience
- Be Authentic, Be Influential, Be Informative
- Thinking big - what do we hope to accomplish in our own state communications network and how do we see this committee changing in the coming year.

The next meetings are on January 9 and on March 26, 2024.

## PERA Update

By PERA Executive Director Doug Anderson



The PERA funds' investment return for the fiscal year ending June 30, 2023 was 8.9%. The combination of an investment return that exceeded our assumed return and member and employer contributions sufficient to help reduce the unfunded liability will help slightly improve the health of our General Employees Retirement Plan (the "Plan") as measured on June 30, 2023. We are waiting for final reports, but expect the Plan to be about 85% funded. More importantly, the Plan is projected to improve towards being fully funded within the next twenty years.

In addition to those positive steps, the Legislature allocated most of the money they made available to PERA to help improve the funding health of the Plan. PERA advocated that a higher priority be placed on funding existing benefits and reducing the unfunded liability rather than a temporary contribution reduction or increasing benefits.

PERA General Plan retirees will receive a 1.5% benefit increase effective January 1, 2024. Our Board acknowledges that retiree benefit increases are not keeping up with recent inflation increases. However, although progress has been made, it is clear that the Plan is not currently in a position to either lower member or employer contributions or increase member benefits unless those changes are fully funded by the Legislature

In 2023 the Legislature did provide direct funding for a retiree benefit increase. In addition to money to reduce the Plan's unfunded liability, the Legislature fully funded a one-time non-compounded benefit for retirees that will equal 1% of their annual benefit amount. Basic members in PERA General will receive 2.5% of their annual amount. This amount will be paid to most of our retirees in early 2024.

Generally speaking, PERA's Board will support certain benefit increases provided the changes are equitable within our membership and come with appropriate funding. PERA will want to ensure that any proposal to increase benefits comes fully funded so that the sustainability of the Plan is not further threatened.

## Regional Meetings

This spring your Retired board was able to host two regional meetings for our retired members. On Monday, September 11, we held a regional meeting in the Windom area at the BARC Center. Then we moved to the Rochester area on Tuesday, September 12 for a meeting at the Holiday Inn South Rochester.

Five informational sessions were held at each meeting including:



- Who We Are and What We Do - an introduction to your Retired Board, our committees and activities.
- Legislative issues
- The NEA Member Benefits Program
- TRA/PERA presentation
- Update on outside groups trying to influence school board elections and other local elections.



Participant feedback was good for both regional meetings. The committee will be meeting to discuss the timing and locations for future regional meetings.

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

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



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



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

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



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: \_\_\_\_\_

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

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## December 2023

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

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

## Calendar of Events

December 29 - Nomination form and picture postmarked deadline  
February 5 - Ballots will be mailed out  
February 12 - Board meeting  
March 1 - Ballot postmarked deadline  
March 1-3 - NEA Leadership Summit, Chicago  
March 3-5 - NEA Retired Annual Conference, Chicago  
April 19 - Annual meeting  
May 13 - Board meeting  
August 12 - Board Meeting

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

