



Retired

# Action

## From the president

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Julie Jagusch

Education Minnesota Retired has had a busy year! We appreciate all of the members who joined us for various events.

We held four Retired Governing Board meetings this year: February, May, August and November. If you are interested in being on our Governing Board, please check out the nominations and elections information in this newsletter!

Our Annual Meeting was held last April and we will hold our next one on April 21, 2023. Currently, plans are to hold the meeting at the DoubleTree Hotel in Bloomington. All members are welcome and encouraged to attend. Watch for information about the annual meeting in our Insider emails.

In April, six members represented you at the Education Minnesota Representative Convention. This will again be held in April of 2023. If you are interested in running to be a delegate to this convention, look for information on how to run in this newsletter.

Six members attended the NEA-Retired Conference in Baltimore last March, where we attended sessions including increasing membership, and racial and social justice. We found these to be very interesting and informative.

In late June and early July, nine elected members represented us at the NEA-Retired Annual Meeting and the NEA Representative Assembly. Seven members attended in person and two attended virtually from home. In 2023, these meetings are scheduled to be held in Orlando, Florida. We will be electing delegates in our next election. Again, if you are interested in running to be a delegate, please check out the election information in this newsletter.

In September, we held our Fall Conference at Ruttger's Resort on Bay Lake. We had speakers on travel, pensions, mental wellness and more. We heard from Secretary of State Steve Simon about the security of elections in Minnesota. Entertainment was provided by Dos Guys from Brainerd. Attendees also enjoyed a pontoon cruise on the lake and happy hour!

October brought MEA and along with that, our Fall Breakfast. We haven't been able to hold this event for two years, so we were grateful to be able to be together in person again. State Auditor Julie Blaha spoke to us, along with AFT president Randi Weingarten and all three of our Education Minnesota officers, Denise Specht, Monica Byron and Rodney Rowe.

The 4<sup>th</sup> Annual Minnesota/Wisconsin Joint Conference was held in Eau Claire in November. About 80 members from both states attended and heard from former Wisconsin Governor Martin Schreiber, as well as attended sessions on Staying Engaged and Proactive as a Retired Educator, Mindful Self-Compassion and Identity Theft and Fraud.

We look forward to continuing with our in-person meetings in the upcoming year and even hope to bring back some regional meetings. Watch for more information in upcoming Insider emails.

# What is Education Minnesota Retired?

By Myrna Doran

## **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
- Wes Tessman, 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
- Membership by election only
- 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
- Joan Beaver and Chuck Lyons, Chairs

## **Education Minnesota committees**

- Education Minnesota President Specht appointed Judy Rohde to the Education Minnesota Professional Advocacy Committee which works on seminars and education advocacy topics.
- President Specht also appointed Susan Witt to the Education Minnesota PAC to represent Retired at the state PAC meetings.

# Education Minnesota Retired Governing Board

LAST NAME	FIRST NAME	POSITION
Jagusch	Julie	President
Tessman	Wes	Vice President
Millette	Bob	Treasurer
Kjellberg	Sharon	Secretary
<b>Vacant</b>	<b>Vacant</b>	<b>Past President</b>
Stringfield	Cathy	District 1a Director
Larson	Diane	District 1b Director
Hanna	Wes	District 2a Director
<b>Vacant</b>	<b>Vacant</b>	<b>District 2b Director</b>
Larson	Dan	District 3 Director
Rothman	Elaine	District 3 Director
Beaver	Joan	District 4 Director
Rohde	Judy	District 4 Director
Doran	Myrna	District 5 Director
Pixler	Pixie	District 5 Director
Nystrom	Bob	District 6a Director
Witt	Susan	District 6b Director
Josephson	Roger	District 7a Director
Schwalbach	Jayne	District 7b Director
Margo	Roberta	District 8a Director
Cummings	Jan	District 8b Director
Brown-Kruesel	Jeanne	At Large
Munsterman	Walter	At Large
Lipke	John	At Large - ESP
Lyons	Chuck	At Large - Higher Ed

# Legislative Action Committee

By Joan Beaver



A new Minnesota Legislature is coming to town in January and the Retired Legislative Action Committee (LAC) wants educator pensions to be on their agenda. TRA and PERA contribution rates, benefits, age of retirement, Cost of Living Adjustments (COLA) and more are regulated by the Legislature. There were proposed bills last spring, which would have tapped some of the state budget surplus for a COLA improvement. However, the Senate majority stopped negotiating about the surplus so the bill was not passed. We are hopeful that the newly elected majority will be interested in making the much-needed improvements to the pension programs, both for future and current retired members.

The state of Minnesota has chronically underfunded its pension systems. Most active educators are now looking at age 66 for full retirement benefits which means a substantial benefit reduction for earlier retirement. And Retired members are suffering a dramatic loss of purchasing power with a rate of inflation that is far greater than the current one percent COLA.

Education Minnesota Retired is a local of Education Minnesota and we have a voice in its priorities as well as solidarity with all members. Retired will actively support pension improvements for all demographic groups within the membership, as well as improvement to COLAs. Last spring, an Education Minnesota task force studied educator retirement pensions and recommended improvements. Retired LAC Chair Joan Beaver served on the task force. Its report and proposals to the Legislature, with rationales, can be found at this website <https://educationminnesota.org/advocacy/at-the-legislature/pensions/>.

Although the legislative majority may be more inclined to support pension improvements, we will need to work hard to educate representatives about the advantages of a secure, equitable and sufficient pension program in efforts to recruit and retain a competitive workforce.

This will require many voices to advocate with our legislators.

You can act for your interests and the interests of our active colleagues and union members by:

- Introduce yourself to your local House member and Senator now and let them know you look forward to explaining your need for pension improvements
- Give us your email address so we can inform you when your voice is most needed with phone calls and email messages to Legislators and invite you to upcoming events
- Attend the 2023 Retired Legislative Conference (date and location to be determined)
- Participate in Retired Lobby Days (dates to be determined, hopefully at the Capitol)
- Sign up for email updates on pension advocacy at <https://educationminnesota.org/advocacy/at-the-legislature/pensions/>

# Communication Committee

By Myrna Doran

Several years ago, we started sending our newsletters and other publications to members via email. Since we don't have current emails from all our members, we wanted to send a printed newsletter. Most of the information is a review of our organization from this past year.

Our regular publications include:

- Monthly Insider emailed the first Wed. of every month with updates events and important information.
- Electronic Action newsletter distributed twice a year with detailed with information about Retired activities.
- Email blasts are sent when there are time sensitive topics.

We would like to include additional members on our email list. It is the best way to be informed about the activities of your organization. If you do not receive our electronic publications, please complete the form at <https://bit.ly/3VPEncU> or call Stephanie at 651-292-4877.

# NEA Board of Directors

By Judy Rohde



I was elected as one of six retired members to serve on the 170 member NEA Board of Directors (BOD). Next to the NEA Representative Assembly, the NEA BOD is the highest ruling body for NEA. We meet four times a year in person, three times in Washington DC and at the NEA Representative Assembly in addition to numerous virtual meetings.

Before each NEA BOD meeting in DC, we lobby all of our MN representatives and senators. This past year NEA has been lobbying on:

- Education funding for public schools
- Student loan debt
- Child nutrition reauthorization
- Marriage equality
- Social Security Fairness Act to Repeal GPO/WEP
- Educator shortage
- Safe schools
- Paid leave

At our last BOD meeting, we had President Joe Biden come to the NEA building. It was awesome to have President Biden speak to us for about 30 minutes. NEA President Becky Pringle gave a big shout-out to all the members who worked on election activities and for getting our members out to vote. There were many positive wins for public education thanks to your involvement.

How can you help active educators in our schools? Be a substitute teacher or support staff person! Our educators are under a lot of pressure and are burning out at a high rate. Teachers are using their prep times to sub for absent colleagues. You can help by being a casual substitute. With your NEA membership, you are covered with liability insurance.

The annual NEA Retired Conference will be held March 12–14, 2023 in San Francisco. If you are interested, please let us know. 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 retirees on the NEA BOD.



The 4<sup>th</sup> Annual Wisconsin/Minnesota Joint-Border Retired Conference was held in Eau Claire, Wisconsin on Nov. 15. There were approximately 80 members of Education Minnesota Retired (EMR) and Wisconsin Education Association Council – Retired (WEAC-R).

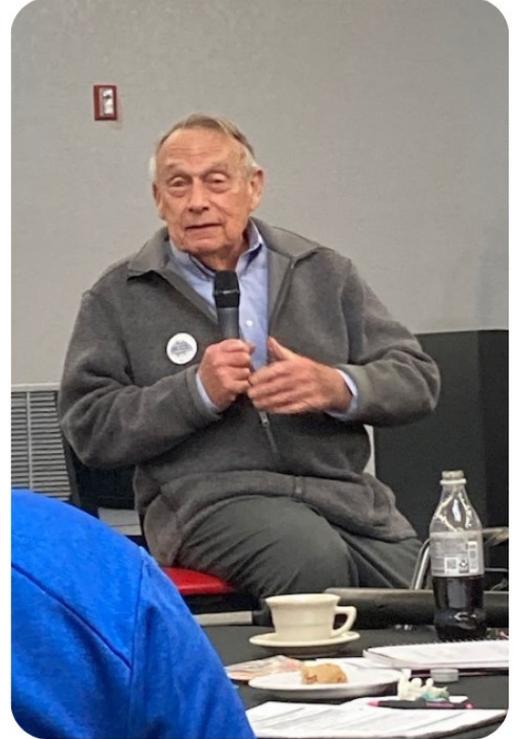
The keynote speaker was Marty Schreiber, former Wisconsin Governor, business owner and author. His book, *My Two Elaines*, chronicles the care he provided his wife who lived with Alzheimer's disease for 18 years. Mr. Schreiber shared the wisdom he gained by combining the lessons he learned and his sense of humor.

Additional sessions offered included:

- Staying Engaged and Proactive as a Retired Educator
- Mindful Self-Compassion
- Identity Theft and Common Scams

The silent auction for the NEA Fund for Children and Public Education was a rousing success, raising \$2,207! A great thanks to all who helped and contributed to the silent auction! The joint conference will be back in Minnesota in the fall of 2023.

# Minnesota and Wisconsin Joint Retired Conference



# Education Minnesota Retired Local Chapters

By Wes Hanna



You can take retirees out of the schools, but you shouldn't!

In our local, teacher retirees often ask for information on our local schools. This connection may fade but never goes away. We have a vested interest in our legacy. Local chapters can help retired members remain active and connected. In my Burnsville Area Retired Teachers chapter, we are committed to several goals including social connection, community service, school connection, political action, and economic and professional welfare.

Prior to the Covid pandemic, we had begun volunteering in our local schools, a great way to stay connected to the school community retirees once served. It is our hope that we will be able to return to volunteering, in increasing numbers, as both Covid 19 and seasonal flu outbreaks subside. We believe as we develop both volunteers and opportunities, that we can be a positive and dependable force in our local schools.

Beyond our school alliance, which is a priority to our members, we plan to explore community service opportunities to use our retiree skills to benefit community needs. We believe that, once again, our pool of skilled, active, engaged retirees would align well with local food banks, charities, service projects, or collaborating with church and philanthropic organizations.

Our recent elections are a reminder of how important our retiree generation can be as a positive impact on democracy. We had many, many retirees, throughout the state, volunteer as campaigners and as election officials. Many thanks to the hours these incredibly committed retirees put in to serve their local communities and beyond. Our attention to elective and legislative advocacy has never been needed more and we have many retirees with time and skills to make a difference.

It is an ambitious list, no doubt, but, what if you don't have to do it alone? Founding or serving in a local chapter of Education Minnesota Retired can be the most effective and efficient path to really achieving your post retirement goals and staying relevant. Relevance, I believe, is one attribute retirees crave. Current local chapters are: Northfield, Minneapolis, St. Croix EM, Owatonna, Burnsville and Anoka-Hennepin.

You may not always be relevant just by being involved but you must be involved to remain relevant! At Education Minnesota Retired, we can help! If you already have a Local Chapter, we have grants available to grow your activities and your membership. Your local can be that community force for the common good. If you would like to organize a local chapter, we have grants, up to \$500, to help, plus samples of Constitutions, organizing documents and a network of support.

Stay relevant. Stay connected. Get involved. We are ready to help for the common good.

## Membership Update

By Sharon Kjellberg

Do you know a teacher or support professional who is retiring this year? You can help them stay connected in their retirement and maintain benefits of union membership. Continuing as a member of Education Minnesota in retirement is easy and there is no additional cost with continuous membership! As when we were active employees, maintaining union membership with a strong communications network keeps us informed of issues dearest to us. As a Retired member, you can maintain all the benefits of active membership just by registering to transfer your union membership from active status to retired status!

Retired membership benefits include: liability insurance if you do any subbing in a public school, ability to continue any union sponsored insurance plans, continue to attend Education Minnesota professional development opportunities and continue to be informed of current issues affecting retirees. Every month you will receive an email newsletter with vital information including pension updates

Personal contact with a retiree-to-be is a good way to encourage them to continue their union membership as an Education Minnesota Retired member. The registration can be done online at [www.educationminnesota.org](http://www.educationminnesota.org) by filling out a simple form. Click on Membership and Benefits, then Retired Member. On the Retired Members page, scroll down to get to the Retired sign-up form.

Please help spread the word, we are stronger together!

# Education Minnesota Retired Elections Update

By Jayne Schwalbach

Nominations for the following positions are now open. The following positions are up for election this year.

## Education Minnesota Retired officers

- President
- Vice-President

## Education Minnesota Governing Board\*

- District 2A
- District 2B
- District 4 (two positions)
- District 6A
- District 6B
- District 8A
- District 8B
- At-large (one position)

## Delegates to:

- Education Minnesota Representative Convention, April 2023\*\*
- NEA-Retired and NEA Representative Assembly, Orlando June-July 2023\*\*

If you are nominating yourself or someone else, you will need to send in the form along with a nomination statement and a picture. The nomination statement has increased from 40 words to 80 words. The forms can be sent by US mail or email. More information is on the nomination form. Nomination forms are available on the website and in this newsletter. Nomination forms must be postmarked by Dec. 30.

Ballots will be mailed out in February. We will send an email notifying you when they are mailed so you can keep a watch out for them. Ballots must be postmarked by March 3, 2023. Please take the time when you receive the ballot to complete it and send it back as soon as possible.

The results will be posted in mid-March after the governing board has approved them.

If you have any further 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).

\*If you are considering serving on the governing board, the board meets four times a year and board members are expected to attend the annual meeting in April.

\*\*If you are considering attending the Education Minnesota Representative Convention or the NEA Retired Annual Meeting and NEA Representative Assembly, there is funding available to cover your expenses to attend.

## 2022-23 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)

President (1 position)

District 6A (1 position)

Vice President (1 position)

District 6B (1 position)

District 2A (1 position)

District 8A (1 position)

District 2B (1 position)

District 8B (1 position)

District 4 (2 positions)

At Large (1 position)

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

**Education Minnesota Representative Convention** (4 Delegates)

April 21-22, 2023, Doubletree by Hilton  
Bloomington, Minnesota

**NEA Retired Annual Meeting & Representative Assembly** (9 Delegates)

NEA Retired Annual Meeting, June 29-30, 2023  
NEA Representative Assembly July 2-6, 2023  
Orlando, FL

**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.

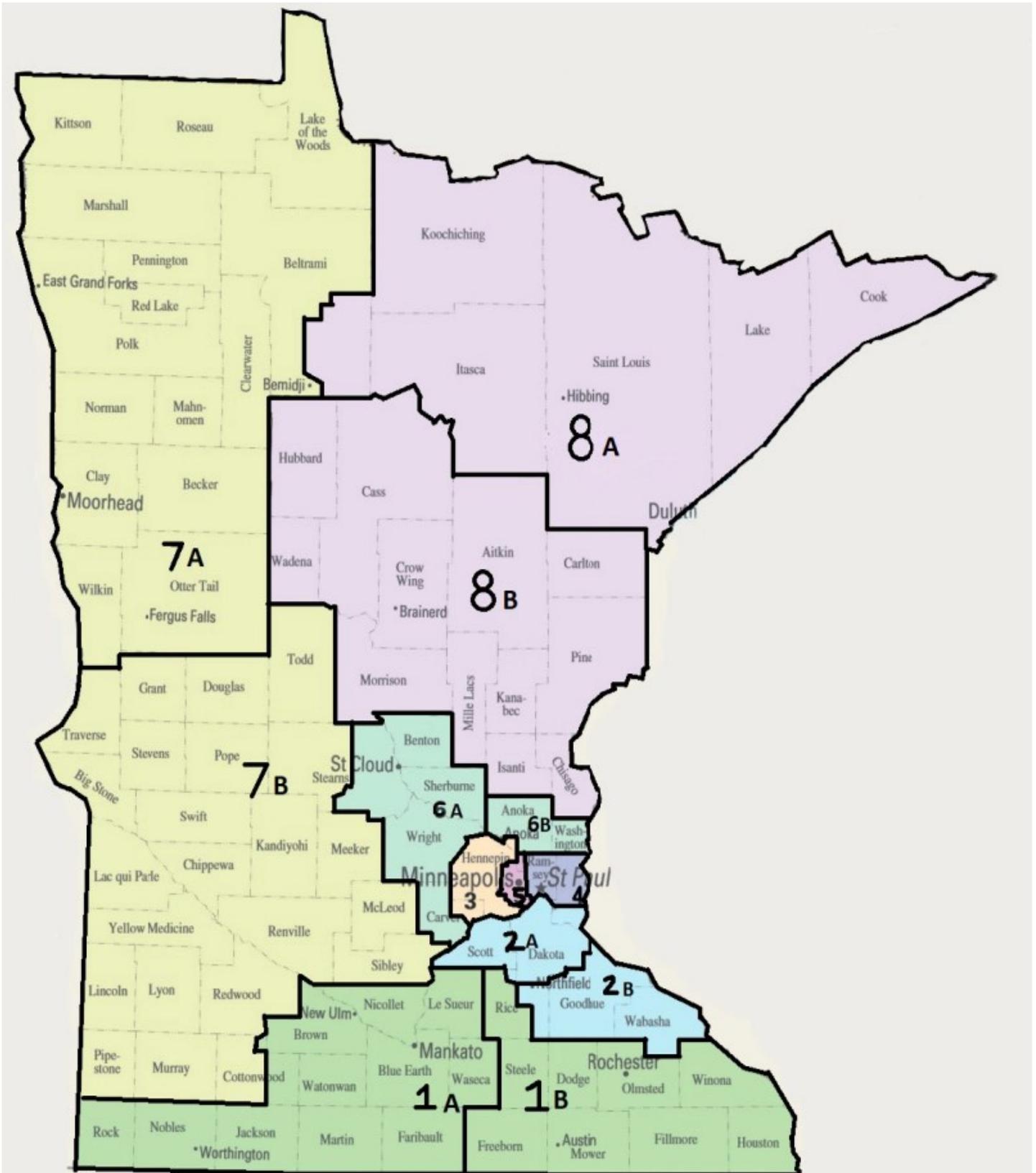
## Election Guidelines

- Elected candidates will assume office immediately following the Education Minnesota Retired Annual Meeting on Friday, April 21, 2023
- 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. 30, 2022 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. 30, 2022.
- Photos and statements of each candidate will be included with the ballots that will be mailed the week of Feb. 6, 2023.
- 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. 30, 2022 Nomination form **and picture** must be returned, postmarked or electronically received on or before December 30, 2022.
- Feb. 6, 2023 Ballots will be mailed to Education Minnesota Retired members the week of Feb. 6, 2023.
- Mar. 3, 2023 Ballots must be returned, postmarked on or before March 3, 2023, to:  
**Education Minnesota Retired Elections**  
41 Sherburne Ave.  
St. Paul, MN 55103

# District Director Map



# TRA Update

I'm Marti Zins, the current board chair of the Minnesota TRA (Teachers Retirement Association). I am retired from the Hopkins school system, having taught in Worthington prior to that. I served as state president of the former MEA and in my local union as president and negotiator.

TRA is the retirement system for MN licensed teachers, licensed school personnel, principals, superintendents and post-secondary educators who elected to be part of TRA. The Minnesota legislature created the pension plan and it is defined in state statute.

Our job is to administer, not legislate, TRA. We establish rules, policies and procedures. The board has a fiduciary responsibility to administer the fund giving equal weight, to balance the interests of and consideration to the members, the state and the taxpayers. One can not be favored over the other. The Board's job includes hiring the Executive Director, budgeting to administer and pay the \$160 million monthly pensions, hiring an actuary to assess the financial status of the plan and hearing member appeals.

We are an eight-person board consisting of four active teachers (each with a 4-year term, elected by active teachers), one retired teacher (4-year term, elected by retired teachers) and three appointees designated by the Department of Education, Minnesota Management and Budget and the Minnesota School Boards Association.

In addition, there are thirteen stakeholder groups, including Education Minnesota and Education Minnesota Retired, that monitor and offer suggestions to the Board. These groups are the political clout that lobbies the legislature and helps define any proposals for course correction offered by the TRA in our work in administering the plan.

TRA board meetings are open to the public, currently in person or virtual. Meeting documents are public information. Numbers of meeting vary per year.

The TRA president is also invited sit on the Education Minnesota Retired Board, as a non-voting member, to update them, respond to questions and hear concerns. There are also publications created by TRA sent to all members including the Teachers Retirement Information Bulletin. Members can also find updates on the website, [www.minnesotatra.org](http://www.minnesotatra.org) and follow us on Facebook or Twitter at MinnesotaTRA. If need further assistance, you can also call TRA at 651.296.2409 or 800.657.3669.

TRA encourages members to create and login to your MyTRA account. By doing so, you can make sure your information is secure, information is updated and get current information including the new tax requirements in effect. You can reach me at [martzins@comcast.net](mailto:martzins@comcast.net) or Martha Lee Zins [MZins@minnesotatra.org](mailto:MZins@minnesotatra.org)



## AFT Retired Program

By Walt Munsterman

The AFT Retired Program and Policy Council was formed a few years ago to discuss and address issues facing retired educators across the nation. Retirees from across the country make up the committee. Walt Munsterman, a former leader in the Minnesota Education Association and currently a very active member of Education Minnesota Retired, serves as our representative. Because AFT does not have dues set aside like NEA Retired does, the Council is currently working on internal organizing structures and funding options. Watch for more information as they continue their work.

# Social Justice and Equity Committee

By Joan Beaver

Education Minnesota Retired established a special committee in 2021 to move our organization toward racial equity and diversity. Several members of the Retired Board joined the committee and President Julie Jagusch invited any interested members to join also. Education Minnesota has been working on equity and social justice for many years. We were fortunate to have staff provide the Cultural Competency training program in person to board and committee members.

All the Retired members who did the eight-hour Cultural Competency training appreciated the eye-opening experience and recommend it to all members. The training is available online to members and re-licensure renewal credits are awarded. Above all, we learned how much we have to learn.

Individual members are also reading and setting personal goals to move toward an anti-racist mindset and actions. Committee members are reading books on racism like *The New Jim Crow: Mass Incarceration in the Age of Colorblindness* by Michelle Alexander. Books members may want to read about racism include:

- ◆ “How to Be An Anti-racist”, Ibrim X. Kendi, 2019
- ◆ “One Person: No Vote, How Voter Suppression Is Destroying Our Democracy”, Carol Anderson, 2018
- ◆ “Why Are All the Blacks Kids Sitting Together in the Cafeteria?”, Beverly Daniel Tatum, 2017
- ◆ “Caste: The Origins of Our Discontent”, Isabel Wilkerson, 2020
- ◆ “Just Us: An American Conversation”, Claudia Rankin, 2019
- ◆ “Between the World and Me”, Ta-Nehisi Coates, 2015
- ◆ “Stamped from the Beginning: The Definitive History of Racist Ideas in America”, Ibrim X. Kendi, 2016
- ◆ “So You Want to Talk About Race”, Ijeoma Oluo, 2018
- ◆ “The New Jim Crow: Mass Incarceration in the Age of Colorblindness”, Michelle Alexander, 2nd edition, 2020
- ◆ “White Fragility: Why It’s So Hard for White People to Talk about Racism”, Robin DiAngelo, 2018

## My involvement with NEA

By Bobbie Margo



During my teaching career and in retirement, I have been involved with NEA. However, it all stems from being involved locally and statewide. As an active leader in my local, the Virginia Education Association, I fought at the bargaining table for affordable health care, a decent salary and fringe benefits. This involvement continued to the state level with Education Minnesota as an elected delegate to the NEA Representative Assembly. Through that involvement, I also was fortunate to be elected to represent Education Minnesota on the NEA Resolutions committee. For me, NEA represented the union stronghold which enabled educators and school personnel to fight for a meaningful

career. My active career spanned 33 years, all in the same school district. I was hired first as an elementary librarian and retired as a media specialist.

As a retiree, I wanted to continue to be involved and continue to fight for those who are actively employed in the education field, as well as our retirees. I became active in Education Minnesota Retired and again was lucky enough to be elected to attend the NEA Representative Assembly and the NEA Retired Annual Meeting. Through NEA Retired, I was again elected to the NEA Resolutions committee representing Retired. After serving on Resolutions for six years, I wanted to continue to be involved. I ran for and was elected to the NEA Retired Executive Council. Currently, I am serving my second and final three-year term. The local, state and national unions are without question one of the most positive influences in my life.

# PERA Update

By PERA Executive Director Doug Anderson



The PERA funds investment return for the fiscal year ending June 30, 2022, was negative 6.4%, far short of the current 7.5% assumption set by the Legislature. In addition to the low return, our actuary has been advising us that 7.5% is not a reasonable assumption for future earnings expectations. They recommend an assumption in the range from 5.6% to 6.5%.

As we head to the 2023 legislative session, PERA will likely advocate that the investment return assumption be lowered from 7.5% to a rate more consistent with our actuary's expectations. We believe that this will better align the mandatory reporting with the information that our board considers when assessing the health of our plans.

PERA General Employees Plan retirees will receive a 1.5% benefit increase effective January 1, 2022. We acknowledge that retiree benefit increases are not keeping up with recent inflation increases. However, after reflecting on the negative return and considering lower future expected earnings, it is clear the Plan is currently not in a position to either lower member or employer contributions or increase member benefits.

During the 2022 legislative session there were proposals to increase retiree benefits. PERA's Board did support certain benefit increases, provided the changes had appropriate funding. PERA's initiative will be to ensure that any proposal to increase benefits comes fully funded so the sustainability of the plan is not further threatened.

Information about the health of our plans and our retiree benefit annual increases can be found on our website: <https://mnpera.org/>.

## NEA Fund for Children and Public Education

By John Lipke



Contributions to The NEA Fund for Children and Public Education from our Education Minnesota Retired members have increased this past fiscal year. We are hoping to see an increase in dollars contributed and the number of donors participating in this program in 2023 and beyond. In July, Education Minnesota Retired received an award for increasing our contributions by 4%.

In November, Education Minnesota Retired received another award for increasing both the money raised and the number of donors by 4%. A big thank you to all who contributed!

All members are encouraged to consider a cash donation or a donation/purchase at one of the two silent auctions held by NEA in June and Nov. 2023. These contributions help children and ensure that the voice of education is heard in Minnesota and our nation.

Please consider encouraging other retired members and friends to donate to the NEA Fund for Children and Public Education. You can donate online at <https://educationvotes.nea.org/donate/>.

F o u n d a 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.**



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## December 2022

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)

## Calendar of Events

- Dec. 30 - Nomination form and picture postmarked deadline
- Feb. 6 - Ballots will be mailed out
- Feb. 13 - Board meeting
- March 3 - Ballot postmarked deadline
- April 21 - Annual meeting
- May 8 - Board meeting
- Aug. 14 - Board meeting

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



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