

Retiree

CSEA

NEWSLETTER

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A Publication of
California
School
Employees
Association

PACHECO ✓
for CalPERS 2021

DAVID MILLER ★ 2021
FOR CALPERS BOARD

ELECTED!



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CSEA efforts drive success of CalPERS election

Member Jose Luis Pacheco and David Miller will protect your pension

by Shannon Carr

When CSEA member Jose Luis Pacheco and David Miller won their elections for the CalPERS Board of Administration in this fall's election, it wasn't just a testament to their unequaled qualifications, but it also spoke to the invaluable support provided by CSEA members and retirees.

The final turnout was over

196,000 votes, which is the highest in recent memory and possibly the highest ever. Pacheco won the Position B seat decisively with 61.76 percent of the vote and incumbent Miller retained his Position A seat with 72.65 percent, both well in landslide territory.

"WOW! Am I excited!" Martha Penry, chair of the Retiree Unit Execu-

tive Board, said. "These wins are critical to the protection of ALL CalPERS pensions, especially school members, retired and active alike. Having a safe, secure and protected pension gives me great peace of mind and gives active members the ability to plan for those golden years."

OVERWHELMING SUPPORT FOR PHONE BANKING EFFORTS

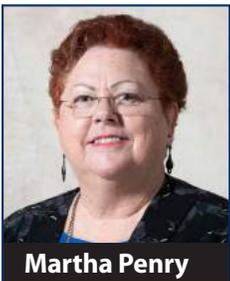
She was among the 58 retirees who participated in 109 shifts for the CalPERS campaign and shared her thanks for all those who were part of the efforts. For the retiree-to-retiree phone bank, more than 13,000 dials were placed, and more than 363,220 dials were made for the active member phone banks. Almost 1,000

(continued on page 8)

ALSO IN THIS ISSUE: District Director and Secretary Statements of Intent, pages 15-18

MESSAGE FROM THE CHAIRPERSON

Changes to Fall upon us, upcoming events and fundraisers



Martha Penry

As the foliage turns color and the morning temperature is a bit more crisp and brisker, wonderful fragrances fill the air and suddenly it's fall! Yes, my favorite time of the year!

Fall also makes me remember how grateful I am for my family and friends. My hope is that soon we will all be able to gather again, celebrating our special holidays. Many years ago, Mike and I learned a lesson of love and giving from a dear friend: "Open up your home to those less fortunate." From that day, every year that we are able, we open our home to neighbors and friends who may be alone and have no one to share a meal with. The stories we have heard and shared are now fond memories and the joy that is shared is truly a blessing! Our hope is that you too will feel the love and joy and join us in opening up your home to those less fortunate. Big or small, we all have something to be thankful for!

During our Council 5015 December meeting, we will host our "Winter Celebration." This celebration is our annual fundraiser for our own council grant, the Norma Pyle Scholarship. As the council president, during July's Annual Conference, I was able to visit all of the CSEA-endorsed providers and click on the "book it" link to register

our council and now have seven providers attending our celebration! We are so excited and looking forward to sharing all this amazing information with our members! It is not too late for you to reach out to our endorsed providers and ask them to attend your council meeting. They have so much information to share!

Our Leadership Conference is a wrap and if you missed it, you missed an amazing conference! We had 234 retirees in attendance this year. 117 were registered delegates and, for the first time, we opened it up to "guests" and had 107 register

and attend! I want to take a minute to thank our conference chair, District B Director Paulette Foster, and her committee for going above and beyond our expectations! We had music by the Jackson Steel Band, fabulous guest speakers, fun with trivia questions, an amazing cooking lesson, exercise, an art lesson, a little comedy and very valuable training for council leaders! On our last day, we gave away so many fabulous prizes! It was two-and-a-half days full of good times and fantastic prizes! Through Owl Bidding, with the donations of auction items from our wonderful members, we were able to raise more than \$1,300 for our Granny Grant scholarship fund! I would also like to congratulate

our amazing retirees, Paula Pelton and Tammy Shafer-Noriega. Both received the "Spotlight on Excellence" award. These awards were brought forward by the Retiree Unit Executive Board in recognition of the time and dedication these two ladies have given to all retirees and the Granny Grant fund. Congratulations again Paula and Tammy! I would also like to thank our fabulous staff, Debb Jachens, Rosalinda Cardenas and

Beth Mattson and our Board liaison Area H Director Bill Hagar for their incredible "behind-the-scenes" work! They kept us up and running, never

"My hope is that soon we will all be able to gather again, celebrating our special holidays."

missing a beat!

One of my goals this year is getting updated email addresses. I know you hear it from me over and over, but this is so very important! When members retire, time and time again they list their work email and not a personal email address. Unfortunately, when you leave your job, your email address ceases to exist. If we cannot reach you then you are missing out on important updates from CSEA. **Please understand, CSEA does not sell your email address or personal information.** It is not only about CSEA and the Retiree Unit, but it is also about keeping your CalPERS information updated! During our recent council meeting, our guest speaker was Past

President and CalPERS board member Rob Feckner. He spoke about updating email addresses, Power of Attorney forms and so much more. If CSEA and CalPERS do not have your current information then you or your beneficiary may not receive all of the benefits they are entitled to. He spoke

"For all in-person CSEA statewide functions, all attendees are required to be vaccinated and must show proof to attend..."

of instances that were heartbreaking because personal information was not updated. Please, if you have moved, changed your email address or contact number, notify CSEA's Member Benefits department at (866) 487-2732 or email memberbenefits@csea.com.

I would like to leave you all with an important "ask." Our Council 5015 has started to gather loose change during our meetings. All of our change will go to the "Penny Pines" reforestation program. For every \$68 donated, an acre of forest land is replanted with seedlings. All of these horrific fires have consumed so many towns and homes and so many of our members' lives have been changed forever. Please Google "Penny Pines," start gathering your loose change and

donate an acre of seedlings! You can choose one of the many forests listed. They will even allow you to dedicate an acre in memory of someone. Our council voted to donate our first acre in memory of Norma Pyle.

Please do not forget the new CSEA policy (GIB 50-21, October 4). For all in-person CSEA statewide functions, all attendees are required to be vaccinated and must show proof to attend, regardless of whether the meetings are held in a CSEA facility. Councils do not have this same requirement. They are required to follow all CDPH and local county guidelines as described in the CSEA Return to Work Guide. You may set up a confidential file with a copy of your vaccination card by sending an uploaded photo to vaxcard@csea.com.

Remember, I may be retired, but I'm Still In!



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*Duly elected

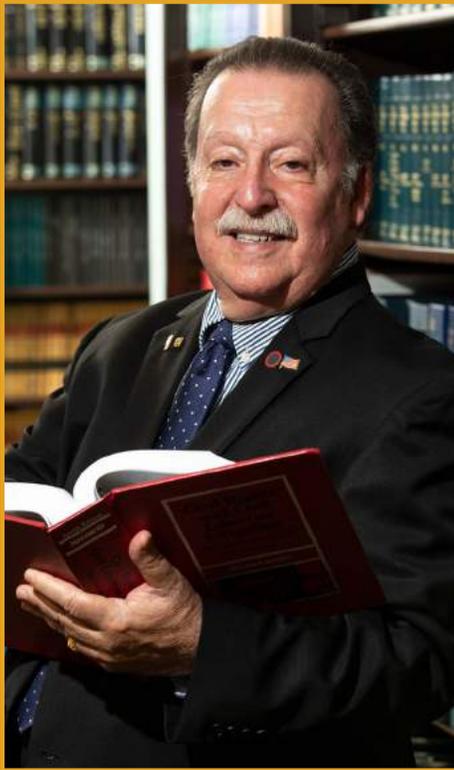
Help us stay connected!



CSEA and the Retiree Unit use email communication to send you important information about meetings, elections, your benefits, and more.

To stay informed, please send your email address, phone number, and mailing address to memberbenefits@csea.com or visit www.csea.com/email.

Remembering Ron Duva



Former RUEB Chair remembered for his dedication to the union

by Shannon Carr

CSEA leader Ron Duva passed away after a long battle with cancer earlier this fall. For more than 30 years, he served the Association tirelessly and with passion, something that will long be remembered by his family, friends, and union sisters and brothers.

“Ron was dedicated to our union and its members,” said Martha Penry, chairperson of the Retiree Unit Executive Board. “He was a great friend and leader to those who knew him. When

Ron retired and became the RUEB Chair, his vision was always focused on the betterment of life for all retirees. He leaves a legacy that will carry on to future generations.”

Duva joined the CSEA family in 1981 with San Joaquin Delta Community College Chapter 359, retiring as a maintenance worker in 2011. He also served as CSEA’s Member Benefits Coordinator from 2001 to 2011.

A third-generation union man,

“It was only natural for me to join CSEA and move into leadership positions right away.”

Duva said in his Life Membership biography: “It was only natural for me to join CSEA and move into leadership positions right away.”

Duva earned Life Membership in 2012, the Association’s most prestigious award that is granted to those who reflect the highest degree of dedication and commitment to the values and ideals of CSEA.

Duva held many state positions over the years, starting in 1990, when he became Assistant Chair of the Community College Committee. He later moved on to become Association 2nd Vice President, Association 1st Vice President and finally Association President from 1998 to 2001.

In retirement, Duva served as President of Santa Clara County Retiree Council 5005 and Retiree Political Action Coordinator. He was most recently Chairperson of the Retiree Unit Executive Board from 2015 to 2020.

Among his many accomplishments, Duva negotiated CSEA’s entry into the national house of labor as an independently chartered union in the AFL-CIO with a Vice President seat on their Executive Council. A staunch advocate for the rights of classified employees, he drove the passage of Senate Bill 400, which provided landmark legislation ensuring employees achieve fair retirement pay.

Duva was an incredible leader whose contributions to CSEA will endure for years to come.

You can send condolences to the Duva family at:

Pat Duva
2210 Bonniebrook Drive
Stockton, CA. 95207

Victory Club key to protecting your pension benefits

by David Ngô

There are many reasons why members, retired and active alike, should contribute to CSEA's Victory Club, not the least of which is protecting our defined benefit pensions.

In a day and age where risky 401k-style plans are still being pushed, public school employees know they deserve to retire with dignity after a long career in public service.

For CSEA members registered in the California Public Employee Retirement System (CalPERS), there is no question that CSEA's political arm, Victory Club, plays a huge



role in electing leaders who will safeguard pensions from private interests.

"Many people think when you retire, nothing can be taken away from you; but that's not true," said Jane Bausa, president of San Diego Council 5056. "Your retirement benefits are not set in stone. It can be there one day and gone the next, depending on who is in Sacramento."

With the recent electoral victory of CSEA's own Jose Luis Pacheco

ascending to an at-large seat on the CalPERS Board of Administration this fall, you can sleep soundly at night knowing we have one of our own in Sacramento.

Victory Club funds helped propel Pacheco to a landslide victory, in which the San Jose/ Evergreen Colleges Chapter 363 president won nearly 62 percent of the vote.

The 13-member CalPERS Board sets policy for retirement and health benefits on behalf of California public employers, including their active and retired employees.

Aside from helping to elect CSEA members to positions of oversight across the state, Victory Club also plays an important role in electing lawmakers who carry legislation that directly impacts retirees.

"CSEA's Victory Club is essential to the protection and advancement of all CSEA members. It is vital to our continued growth and helps create protections, whether you're working or retired," said Martha Penry, chairperson of the Retiree Unit Executive Board. "SB 411 is a grand example of this. It has created fairness for those retirees who choose to work after retirement."

Introduced by Senator Dave Cortese (D - San José), CSEA-sponsored Senate Bill 411 was recently signed into law and will mitigate exorbitant penalties for retirees who inadvertently violate the working after retirement rules set by CalPERS. Senator Cortese was a key, CSEA-endorsed candidate who was elected with the help of

the Victory Club.

SB 411 will lead to fair resolutions in situations where retirees inadvertently violate working after retirement rules, including the work limitation of 960 hours per year. The new law will allow CalPERS to address violations without requiring a retiree to reinstate in the system, forcing the retiree to repay their hard-earned retirement income.

"I'm proud that my inaugural bill package includes a bill sponsored by CSEA, SB 411, 'The Work After Retirement Act,'" Senator Cortese said during his video speech after receiving CSEA's Legislator of the Year award at the 95th Annual Conference this past July. "A bill that will ensure respect, peace of mind, and a sense of security for CalPERS retirees as they continue to contribute to our state schools and public agencies."

As a non-partisan club made up of thousands of active and retired members, when you join your sisters and brothers in the Victory Club, you'll help the Association achieve major legislative victories.

By contributing or enrolling in recurring monthly donations to Victory Club, you are not only advocating for your own retirement rights, but the rights of CSEA retirees across the state.

Joining the Victory Club is quick and easy. Simply choose how you would like to begin contributing by filling out the online form at www.csea.com/victoryclub or calling Member Benefits at (866) 487-2732.

RUEB focusing on recruitment

by Shannon Carr & David Ngô

Recruiting members to join the Retiree Unit is one of the main goals set by the Retiree Unit Executive Board and Chairperson Martha Penry. There are currently just over 11,800 retirees with CSEA, and Penry hopes to see this number grow to 12,000 by Spring 2022. Encourage your former coworkers and friends to continue their CSEA membership for just \$3 per month deducted from their CalPERS check or by paying \$36 annually. They can sign up today at www.csea.com/retiree.

Penry and two fellow retirees share why recruitment is so important, what the Retiree Unit has done for them and so much more.



Martha Penry
Council 5015, President
RUEB chairperson
32 years with CSEA
Five years retired



Carla Held
Oroville Council 5045,
Member
District A Director
33 years with CSEA
10 years retired



Sydney Moy
Sonoma County 5014,
Member
7 Years with CSEA
(Worked at Waugh School
for 23 years and helped
start its Chapter 893)
1.5 years retired

Q: How will the Retiree Unit aim to reach their recruitment goal?

A: Penry: Working with all members, our focus will be on attending Regional Presidents Meetings (RPMs) and chapter meetings and sharing the letter I penned to those leaders. Our partnership with Association President Matthew “Shane” Dishman gave me some time during Super Session to begin our conversation with members and sharing information. We are also working on board goals and will incorporate recruitment as a key goal.

Held: As a retiree and a past president of my chapter, my goal is to reach those coming into retirement, get them signed up so that it is a seamless transition. I sell the new retirees on the value they had as an active member and the value they will receive as a retiree with discounts, the AD&D policy, legal referral service, free college and that I, their district director, am here to help along the way!

Moy: Communication! Receiving the Retiree newsletter, emails from Martha Penry and our district Retiree newsletters helps to keep us informed and lets us know how we can continue to be involved with CSEA and meet others who have retired in our communities and around the state. The quote I saw in one article said it well: “We retired from our jobs, not our union.” Making other retirees feel they are wanted and encouraging them to be included in this next level of our union organization will benefit everyone. Many of our retirees were working the phone banks for Jose Luis Pacheco for a CalPERS

position. It was so important that we all got involved in helping to elect Mr. Pacheco. It was exciting to hear from our members communicating to each other from all over the United States and working for a common cause.

Q: Has being part of the Retiree Unit enhanced your life, especially during the COVID-19 pandemic with so many restrictions to in-person gatherings?

A: Penry: When I became chair in September 2020, COVID was on the rise. Even with the obstacles that were ahead of us, the RUEB came together, we held Zoom board meetings, setting a record attendance, created an amazing Leadership Conference, worked at continuing our focus on recruitment, celebrated our 30-year anniversary, awarded 28 Granny Grants and all while staying safe. I believe my life has truly been enhanced!

Held: Being part of the Retiree Unit has been an exciting and rewarding journey. COVID has made it a little more difficult with Zoom calls but making sure we all stayed connected was a key goal of ours and mine. Using the telephone and snail mail was important as well! Getting the message out to members and letting them know we were still here.

Moy: Yes. Having the ability to reconnect with former and new retirees and keep in touch is a celebration of who we are and defined us. Life goes on with people moving, traveling, new family additions. This is a great way to

stay close to your friends from work. The meetings are also informative about what impacts your retirement and our union concerns. Articles about CalPERS, online workshops, health and technology resources and contributing to our fundraisers like the Granny Grants. Although the meetings were on Zoom, that was a blessing in some ways, because it allowed more people to participate from their living rooms. I feel connected. I'm Still In!

Q: What are some ways retirees can stay connected through the Retiree Unit? Do you think staying active in CSEA with the Retiree Unit helps members with the transition into retirement after a career of public service?

A: Penry: We are still in the recruitment mode, "Ask one, Get One." Helping bring the new retirees into our unit will allow members to continue to utilize their CSEA benefits. Members need to be sure their email addresses are current, allowing us to notify them of all upcoming events, including Council meetings. The Retiree Unit definitely helps make the transition into retirement easier. After 28 years of working, I wondered what I would do, how was I going to fill my time? Getting involved with the Retiree Unit has allowed me to stay active with what I love to do and continue to help members at the same time.

Held: As I stated earlier, phone calls, snail mail and Zoom meetings kept us connected. During the shut-in, I made sure I sent communications weekly

for those I had emails for. I have not slowed down since retirement. I was worried that after active membership I wouldn't be satisfied, but as an active retiree, I have continued my service to members even in this "golden years" time! I would have been lost if not for the active Retiree Unit!

Moy: Our District B Director Paulette Foster, Union Council 5014 President Lorrie Abbott and Communication Pro Nancy Malcolm do a terrific job notifying us about upcoming events and issues. We meet every other month to check in for social and business information. Once you are a CSEA retiree, you don't just stop caring about people, issues and the schools where you were employed for many years. We are invested in the wellbeing and success of those things that inspired or touched us when we were working at our school sites.



"I'm Still In!" highlights issues that matter most to you! Episodes premiere each month

Martha Penry, chair of the Retiree Unit Executive Board, continued her video series "I'm Still In!" with the launch of the November edition. The mission of the "I'm Still In!" series is to keep the more than 11,800 retirees across more than 50 councils informed about the

illustrious amount of work that is happening within the Retiree Unit. The series kicked off during the pandemic to help build connections among retirees who were unable to have face-to-face meetings during that time.

Videos have covered a wide range

of topics since the series launched in October 2020, including the success of the CalPERS election for CSEA-endorsed candidates Jose Luis Pacheco and David Miller, the Retiree Leadership Conference, 30th anniversary celebration information, the chartering of Council 5000 for out-of-state retirees, Granny Grants, committee progress and even special guest Rob Feckner, who is serving his sixth term on the CalPERS Board of Administration

Episodes release every month, so be sure to subscribe to the CSEA YouTube channel at www.youtube.com/CSEAvideo and follow us on Facebook to get the latest news and important information.



(continued from cover)

members, retirees and staff volunteers contributed to this effort.

Martha Steele Spellman, a retiree with Contra Costa Council 5003, volunteered two days for retiree phone calls and one day for active members.

When Spellman learned that Pacheco was a CSEA member, the son of farmworkers, well versed in the world of finance, and he, along with Miller, will retire under the same pension as her, it was obvious “he will be a great steward in watching out for our funds,” she said.

“Once I knew his story and that of David Miller, it became easy to do phone banking because I believed in the message,” she said.

“Thank you to all the CSEA retirees, active members, and other supporters who spent countless hours to make sure David Miller and I won these two CalPERS Board seats.”

When she got an email from both Association President Matthew “Shane” Dishman and CalPERS on October 1 declaring the election results, her first reaction was a fist pump in the air and a “YES!”

“This is the first time that I feel I’ve had a direct effect on an election and I’m so incredibly proud of our members who listened to the message we delivered,” Spellman said. “I was thrilled,” she said. “Not just for our members, but for the two gentlemen who will be representing us.”

PACHECO AND MILLER GIVE THANKS

Both Pacheco and Miller shared their gratitude to the CSEA members who voted them into office and



Photo by Eleakis & Elder Photography

acknowledged that it wouldn’t have been possible without their support.

“I am so deeply honored and deeply humbled,” Pacheco said. “Thank you to all the CSEA retirees, active members, and other supporters who spent countless hours to make sure David Miller and I won these two CalPERS Board seats.”

Miller responded, “Thank you, a thousand times, thank you, for your support and encouragement, for your confidence in me to represent your interests, and for your dedicated service and hard work. I am so proud and honored to serve you, the true everyday heroes for whom CalPERS exists to provide retirement security and health care.”

Their term of office will begin January 16, 2022 and end January 15, 2026.

As a classified employee, Pacheco said he sees how hard his CSEA sisters and brothers “work for modest wages in the public service, knowing that their hard work will pay off when they retire with their well-

deserved pension, providing working families with dignity in retirement. This perspective will keep me grounded.”

Miller brings technical expertise, education and experience to the board on which he has served since 2018.

“However, more importantly, I bring the understanding and values of an active, rank and file public employee, who knows the importance of the retirement and health-care benefits that have been promised to us, and that we get up and go to work to earn, day in and day out,” Miller said. “I will be there to fight to protect and enhance our benefits and to ensure that the promises made to us remain promises kept.”

One of the first things Pacheco plans to work on is creating an effective process for him to communicate with CalPERS members and retirees to swiftly respond to their concerns, and the hiring of a new chief investment officer.

His long-term goal is to make

sure the CalPERS fund not only meets but also exceeds the target rate of return.

“This is imperative so we can grow to 100 percent funding as soon as possible,” Pacheco said. “However, we must do this without excessive risk taking, in a transparent and open manner, and we must manage fees and costs so more funds are put to work for our members.”

Another item he would like to address is the escalating costs of health care that burdens CSEA sisters and brothers, especially retirees.

"I am so very much looking forward to working alongside Jose Luis Pacheco, and my other esteemed board members"

“We all know that healthcare costs are rising, and CalPERS needs to use its enormous buying power to not only contain costs but also provide savings to members wherever possible without a loss in services,” he said.

Miller recognized that, coming together in solidarity with Pacheco, they can address these issues and so much more.

“I am so very much looking forward to working alongside Jose Luis Pacheco, and my other esteemed board members,” he said. “I am anticipating four years of progress, four years of strong effective working relationships among board members and stakeholders, and an environment that is characterized by the open, honest, and respectful exchange of ideas, all in the interest of CalPERS members.”

Reasons to go paperless with CalPERS

by Shannon Carr & David Ngô

With many organizations and businesses adjusting to new health safety guidelines, there is now a larger emphasis on paperless transactions. This includes CalPERS, the nation’s largest public pension fund that serves more than two million members in the retirement system, according to its website.

“At CalPERS, we strive to make our members’ lives easier,” said Amy Morgan, a representative with CalPERS.

With that in mind, you can simplify your life in three ways by going paperless with direct deposit through CalPERS. Doing so is:

- **Safe and secure:** Receive your retirement check right to your bank institution. No more losing or looking around for your check.
- **Fast and global:** Access your retirement check on time no matter where you are in the world.
- **Budgeting simplified:** Plan when your retirement checks arrive through the Pay Days calendar. See page (18) for this information.

When you set up direct deposit, you will also be able to easily track and review your monthly benefit statements in your myCalPERS account.

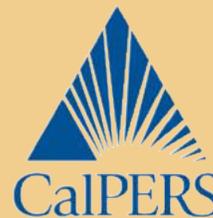
“This is an important feature since, due to COVID-19, the State Controller’s Office is not mailing or printing statements for payees who are enrolled in direct deposit,” Morgan said.

There are two ways to sign up for direct deposit with CalPERS:

- **By mail:** Complete and mail the Direct Deposit Authorization (PDF), www.calpers.ca.gov/docs/forms-publications/direct-deposit-authorization.pdf, to CalPERS.
- **Online:** Log in to myCalPERS. Go to the Retirement tab and select Payment Options.

You should receive your first direct deposit in about 30 to 45 days. Once CalPERS receives and processes your form, they will send you a confirmation letter. If there’s a problem with your form, they will return it within approximately two weeks, along with a letter explaining what they need.

Whether you live in California or out of state, you receive the same great benefits of direct deposit. However, if you live outside the United States, you must meet the federal requirements for an electronic funds transfer (EFT) and some international transactions must be discontinued according to the National Automated Clearing House Association (NACHA). If that’s the case, CalPERS will mail you a paper check. If you need to update your address to receive a paper check, call the CalPERS customer service contact center at 1-888-CalPERS (225-7377).



Granny Grant organizers receive Spotlight on Excellence award

by David Ngô



Tammy Shafer-Noriega and Paula Pelton, members of the Granny Grants Committee, received one of CSEA's most prestigious awards from Retiree Unit Executive Board (RUEB) Chairperson Martha Penry at this year's Retiree Leadership Conference.

The Spotlight on Excellence award is a special honor given to retirees who have displayed an extraordinary commitment to the Retiree Unit. Not only is the award distinct from the Association's Life Member and Honor Roll awards, but recipients must be a retiree who actively contributes to the betterment of the Retiree Unit.

"On behalf of the board, we want to thank you for your dedication and countless hours of volunteer work," Penry said to the two surprised recipients. "You have helped our Granny Grant Committee raise thousands of dollars, enabling us to assist so many wonderful grandchildren. We can never thank you enough."

Both Shafer-Noriega and Pelton played key roles to help the William Turner Granny Grant Scholarship Fund raise money from the 2021 Conference Silent Auction.

The fund provides financial assis-

tance to a grandchild or great grandchild of an eligible CSEA retiree. The money raised helps them as they enter or continue their education at a community college, four-year college or trade school.

"I'm speechless and I'm never speechless," said Shafer-Noriega of Lynnwood Sentinels Council 5019. "I am so honored for this award and it's just such a passion to be able to work with this group of people and everybody. It's really my privilege to work and learn from you all."

"I'm speechless and I'm never speechless"

The Granny Grants Committee often explores different ways to raise funds throughout the year, including the use of flash sales. In the month of September alone, they raised \$535 in a 48-hour flash sale that saw 23 donors contribute.

This year, the Retiree Unit held a virtual silent auction, where the committee successfully raised \$1,330 by auctioning off specially donated items.

Pelton, one of the Spotlight on Excellence awardees, even hand-made quilts that turned out to be some of the most heavily coveted auction items.

"During COVID, we had to produce a virtual way of promoting fundraising and the concept of a Facebook flash sale was created, where every donation over \$20 received a gift," Pelton of Coachella Valley Council 5032 said during a speech with Shafer-Noriega. "We deeply appreciate your crafty and financial donations to the Granny Grant silent auction during conference. Thank you to everyone who participated in making this year's scholarship fund a huge success."

The Spotlight on Excellence award may not be an annual award, but nominations can be submitted by district directors, councils, individual retirees or any RUEB member. Nominations must be submitted before the end of the fiscal year and winners are selected by the RUEB chairperson.

If you would like to nominate a deserving candidate, make sure to fill out the form found in the Retiree Handbook and send it to RUEB chairperson Martha Penry.



Successful Leadership Conference draws delegates from 54 councils

by David Ngô

Words come easy when describing the success of the Retiree Leadership Conference.

Over the span of three days, sisters and brothers from 54 councils, representing 11 districts, congregated virtually to hear from prominent speakers, develop skills and, most importantly, celebrate 30 years of the Retiree Unit.

Marked by special appearances from past and present CSEA leaders, nearly 230 delegates and guests tuned in for live interactive festivities and informative presentations to bring invaluable knowledge back to their councils.

“This year, it was well organized, the information was very important and it was essential to all our seniors,” Lorenzo Rios of San Gabriel Valley Council 5053 said during the open comment session.

For many, taking part in this year’s conference meant more than activities like drawing with a Disney artist or singing “Take Me Home,

Country Roads” with the Jackson Steel band – it was a chance to feel inclusion again after months of social isolation.

“A lot of our members and I live in relatively rural communities far away from any of the major population centers,” said Bobbie Hayes of Humboldt County Council 5040. “The silver lining is that because of COVID and Zoom, this is the first time in a very long time one of our members was able to attend. And it was delightful.”

From beginning to end, attendees were treated to a robust conference full of familiar faces, expert speakers and good ole’ fashioned fun.

Five past presidents attended, including Bill Regis, Clyde Rivers, Rob Feckner, Michael Bilbrey and Ben Valdepeña. They took turns recollecting incredible stories of CSEA lore during Coffee with Past Presidents.

Current Association President Matthew “Shane” Dishman shared

his gratitude to everyone in the Retiree Unit by recognizing those who came before him.

“I will tell you from the bottom of my heart, thank you for the job that each and every one of you do on a given day,” Dishman told delegates and guests on the second day of conference. “You were never told how important you were to the success of this union. Let me tell you again, you are the reason why we are here today.”

All through the three-day event, attendees learned from expert speakers like Peter Meza of the California Department of Insurance and Sarah Schroeder of the Federal Trade Commission, on important matters such as insurance planning and consumer protection.

“The silver lining is that because of COVID and Zoom, this is the first time in a very long time one of our members was able to attend. And it was delightful.”

During the closing remarks, Retiree Unit Executive Board chairperson Martha Penry wrapped up conference by recognizing conference organizers, key contributors like Regional Rep for Region 43 Patricia Picard and Area H Director Bill Hagar, and all the attendees who tuned in enthusiastically each day.

“The last several days was just a wealth of information and it’s so wonderful to hear all of you say you’re going to take this information back to your councils,” Penry said during the final comments of conference. “A very special thank you to each and every one of you for coming together and learning side by side. Remember: I may be retired, but I’m still in!”

United Insurance Partners helps members navigate the world of Medicare



Trusted CSEA benefit provider for more than 20 years

by Shannon Carr

Navigating the world of Medicare can be a lot to handle with complex information and changes occurring year-round, and United Insurance Partners (UIP) wants you to know it's not something you need to do alone.

With the Medicare Annual Enrollment Period running through December 7 and Medicare Advantage Open Enrollment Period running January 1 through March 31, now is the perfect time to connect with a representative and get all your needs addressed. UIP has identified several significant plan premium increases and new plans that will be available.

What may take a member 120 hours to research, UIP independent insurance agent Debbie Hoffman says they can usually do in 10 to 20 minutes.

"We find out what's important to them, we research their doctors, we research their medications, and then we figure out what's going to be the

best option for them," she said.

That is why UIP has been a trusted CSEA benefit provider for more than 20 years, offering free services to CSEA members and your family members for Medicare advice, in addition to offering auto, health and homeowners' insurance.

"We have that relationship with the members already that we value. Can somebody go to another Medicare insurance agent and get help? Absolutely. However, we value this relationship so much," Hoffman said. "They know our heart, they know our ethics."

Each year, Hoffman says they serve between 800 and 1,000 CSEA members.

Because UIP is independent, Hoffman says they have no preference of which plan their members enroll with, "as long as we know it's the right one for them."

In addition to helping clients enroll with plans, a large part of what they do is fix mistakes and

answer questions. Some of these issues include:

- **Medicare blue button:** One of the biggest questions they receive, and have recently fielded 50 questions in one day, is regarding medication reimbursement. To address this issue, Medicare came up with a feature called the "Medicare blue button." You can visit www.medicare.gov, to register for an account, input your medication information, and then give UIP a quick call and say the information was submitted. UIP then sends a secure, private email giving them permission to access those meds. "This is a very safe way that we can get their meds and they put them on our calendar," Hoffman said.
- **Medicare black hole:** Medicare has a chart that they use for enrolling. If you're in the initial enrollment period and want to retire in another month, such as the third or the fourth month following your birthday, if you don't plan it correctly you may not be able to retire when you want and end up in the "Medicare black hole." This recently happened to a CSEA staff member who was retiring. Thankfully, UIP was able to resolve the issue.
- **National brokerage houses:** Many phone calls UIP receives are about seniors who sign up for national brokerage houses after seeing commercials on television. The hype comes from the idea that these plans can do everything for you, but that is not the case. This year, UIP received a call from a CSEA retiree who couldn't see his doctor or get oxygen because neither the doctor nor medical equipment companies were in his network. UIP addressed this issue immedi-

ately and found a resolution.

- **Medication costs:** Many members are on a very expensive medication and Medicare may not pay well due to what is referred to as the “donut hole.” What happens is, suddenly during the year, members will call because they are shocked about having to pay, for example, \$400 for medication when it was previously \$30. This happens when people “hit this line that Medicare has put in the sand, and when you’re in the donut hole, you have to pay 25 percent of the cost of the medication and some of these meds are expensive,” Hoffman said.

She recently spoke with a retiree on a Medicare advantage plan who has multiple sclerosis and with the plan that they put her on, she could not get her medication. Hoffman checked out her meds, which cost \$38,000 a month. When that happens, with assistance from UIP, they call specialty pharmacies or a nonprofit they are associated with to help with their medications.

“I can say without a doubt, we probably save members about a half

million dollars on medication because of that,” she said.

Additionally, if you are on a medication that causes dry mouth or causes your teeth to fall out, you can go to a Medicare certified dentist and have it paid for through Medicare.

- **Long-term care:** Medicare DOES NOT pay for long-term care; it covers skilled nursing only. For example, if you go in for a broken leg and receive rehabilitation, this applies. But if you have a stroke and Medicare or the doctors deem you unable to get better, they can kick you out of the facility even before your 100 days of skilled nursing is up. Hoffman emphasized this is a BIG point of confusion and there are a lot of members who wait too long to get their long-term care insurance, cross the invisible line of uninsured ability and, before they know it, are diagnosed with dementia or suffer a stroke, at which point you can no longer get the insurance. “If anybody is going to look at it, they need to look at it while they’re healthy,” Hoffman said.

- **Medicare can cover dental:** Medicare will cover some dental procedures if it is medically necessary.

As a CSEA retiree, you can contact UIP at any time for help surrounding issues such as these or anything else that pops up and know you will have peace of mind with an advocate on your side.

Due to open enrollment, UIP’s call and email volume has increased tremendously. If you are a CSEA member who needs assistance for yourself or any of your family members quickly, texting is the quickest way to reach them at the UIP Medicare hotline at (323) 505-2640. If it isn’t urgent, you can call and leave a detailed message with what type of insurance you have now, your age, the county and state in which you reside, maintenance medications you take and any other relevant information. UIP will call you back with details and choices.

Retiree Unit Executive Board Elections



The CSEA Retiree Unit Executive Board consists of the Executive Board Chairperson, the Executive Board Secretary, and 11 District Directors, each of whom is democratically elected by CSEA Retiree Unit members to serve a two-year term. This year, elections will be held for Executive Board Secretary, and the District Directors

representing districts B, D, F, H, K and O.

To qualify for a District Director office, candidates must have been a member in good standing of a Council organization within the respective District and file a statement of intent with the Executive Board Secretary postmarked no later than January 3, 2022.

To qualify for Executive Board

Secretary, candidates must have been a member in good standing of a Council organization statewide and file a statement of intent with the Executive Board Secretary postmarked no later than March 1, 2022.

The Statement of Intent and advertising guidelines can be found at www.csea.com/internalelections.

2021 CalPERS Pay Days



Here are CalPERS pay days through the rest of 2021. Benefits are paid at the beginning of the month for the previous month's benefits. The *State Controller's Office* issues checks and determines mailing dates. If you have *direct deposit*, contact your financial institution to see when funds are placed in your account.

2021 Pay Dates

Benefit Month	Southern California/ Out of State Mail Date	Northern California Mailing Date	Direct Deposit Date
November	November 29	November 29	December 1
December	December 30	December 31	January 3, 2022

The State Controller's Office distinguishes Northern and Southern California using ZIP codes:

- 90000 through 93599 as Southern California
- 93600 through 96199 as Northern California

All Retiree Unit members are invited to attend Retiree Unit Executive Board Meetings

Now that shelter-in-place orders have been lifted, the Retiree Unit Executive Board is pleased to host some meetings once again in person. Meetings through July 2022 have been evenly split between meeting face-to-face and virtually. All the meetings are scheduled for 10 a.m. the second Wednesday of the month as follows:

January 12, 2022: via Zoom

March 9, 2022: Rancho Cucamonga,
(location to be determined)

May 11, 2022: San Jose,
(location to be determined)

July 13, 2022: via Zoom

Proof of vaccination required. If you plan to attend in person, you may email a copy of your vaccine card to the CSEA Member Benefits Department at vaxcard@csea.com. Member Benefits will create a confidential record under your name, so you will not need to resubmit

proof every time you attend a CSEA event. If you do not submit a copy of your card in advance, you can also show evidence of vaccination at the door: a photo of a vaccine card is sufficient (you do not need to bring the original). Remember that one is not "fully vaccinated" until two weeks after the final shot.

Look for the links and exact location of upcoming meetings from Member Benefits in future emails. If you don't have an updated email address on file, fill out your information today at www.csea.com/email or call (866) 487-2732.

What is Zoom?

Zoom is an app you can download on any computer, smartphone or smart tablet at no cost. Zoom allows you to both see and hear the presenters and their PowerPoint presentation. It also allows you to use a "chat" fea-



ture to ask questions in real time.

How do I set up my Zoom account?

Go to zoom.us today to sign up for your free account. Download and test Zoom by going to zoom.us/test and follow the instructions.

How do I attend the RUEB meeting?

You must be an authenticated Zoom user (see set up above) and pre-register to attend this virtual meeting by clicking on the links that are sent via email.

After you have pre-registered, and once your CSEA membership has been verified, you will receive an email with the Zoom link and information to join the meeting. We look forward to your participation.

**CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION
RETIREE UNIT**

STATEMENT OF INTENT

This form must be mailed to the Retiree Unit Secretary, addressed as follows, **POSTMARKED no later than midnight, January 3, 2022**. PLEASE COMPLETE ALL OF THE REQUESTED INFORMATION. *To ensure arrival, you may wish to send it by Certified Mail, return receipt requested.*

MAIL DIRECTLY TO:

Executive Department
Teri Minoux, Secretary, RUEB
2045 Lundy Avenue
San Jose, CA 95131

Dear Madam Secretary:

In accordance with the provisions of Section 5(e), Article XIII of the Bylaws of the California School Employees Association, I hereby indicate my intention of seeking election to the office checked below and herewith submit the required information:

1. I am seeking the office of (check one of the following):

District Director, Retiree Unit District # _____
(B, D, F, H, K, O)

2. _____
(First Name) (Middle Name) (Last Name)

3. Home Address: _____
(Street or P.O. Box) (City) (Zip Code)

4. Home Phone # (____) _____ E-mail _____

5. CSEA Member ID or last 4 digits of Social Security # _____

6. I am a member in good standing of:

(Retiree Council Name) (Council#)

7. My dues are paid: annually
 automatic monthly deduction from PERS check
 I am a lifetime member and pay no dues

Sincerely,

(Candidate's Signature) (Date)

(Please Complete Candidate Biographical Information, next page)

THE FOLLOWING INFORMATION MUST BE COMPLETED
(Attach additional, appropriately labeled sheets as necessary for any item.)

- A. List **leadership** experience, in CSEA or other organizations:

Office Held	Organization

- B. List other CSEA activities such as workshops attended, grassroots political activities, etc., if any:

- C. Provide a brief statement of **not more than 100 words** relating why you are seeking the office or why you feel you are qualified to hold the office.

**CALIFORNIA SCHOOL EMPLOYEES ASSOCIATION
RETIREE UNIT**

STATEMENT OF INTENT

This form must be mailed to the Retiree Unit Secretary, addressed as follows, **POSTMARKED no later than midnight, March 1, 2022**. PLEASE COMPLETE ALL OF THE REQUESTED INFORMATION. *To ensure arrival, you may wish to send it by Certified Mail, return receipt requested.*

MAIL DIRECTLY TO:

Executive Department
Teri Minoux, Secretary, RUEB
2045 Lundy Avenue
San Jose, CA 95131

Dear Madam Secretary:

In accordance with the provisions of Section 5(e), Article XIII of the Bylaws of the California School Employees Association, I hereby indicate my intention of seeking election to the office checked below and herewith submit the required information:

1. I am seeking the office of:

Executive Board Secretary

2. _____
(First Name) (Middle Name) (Last Name)

3. Home Address: _____
(Street or P.O. Box) (City) (Zip Code)

4. Home Phone #(____) _____ E-mail _____

5. CSEA Member ID or last 4 digits of Social Security # _____

6. I am a member in good standing of:

(Retiree Council Name) (Council#)

7. My dues are paid: annually
 automatic monthly deduction from PERS check
 I am a lifetime member and pay no dues

Sincerely,

(Candidate's Signature) (Date)

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- C. Provide a brief statement of **no more than 100 words** relating why you are seeking the office or why you feel you are qualified to hold the office.

Medicare Plans Available Through CVT!

Did you know that no matter where you retired from, CVT offers a variety of Medicare plans that are now available to CSEA retiree unit members!

- Six quality plans by Anthem Blue Cross with SilverScript Medicare Part D prescription program and Kaiser Permanente SeniorAdvantage
- Lower co-pays for medical services that include a comprehensive prescription drug program with competitive pricing
- Dedicated CVT Member Services support team

Learn more at cvtrust.org/cseamedicareplans or email the CVT team at CSEAMedicare@cvtrust.org or call (800) 288-9870.



Approved by
California School
Employees Association



DO YOU HAVE QUESTIONS ABOUT MEDICARE? TRY OUR:

No-Cost Medicare Health Plan Counseling Telephone Service

Available exclusively to CSEA Members!

With UIP's No-Cost CSEA Medicare Health Plan Counseling Telephone Service, Debbie Hoffman and her team can help answer ALL your Medicare questions* including (but not limited to): **How to enroll, questions about your current plan, how to change your plan, and your rights and responsibilities with Medicare.**

PLUS: Medicare only covers 80% of your health care costs. UIP can help you cover the rest. UIP can show you different plans that will help you cover the entire cost of your health care with insurance companies whose names you trust. Don't think you have only ONE choice!



Contact Debbie Hoffman and her team today!

Call **323.505.2640*** (direct) or **800.707.2360*** | Visit CSEABenefits.com/Medicare



*By calling the number listed, you will be reaching Debra Hoffman, a licensed insurance agent in the State of CA. Neither United Insurance Partners nor Debra Hoffman is connected with the Federal Medicare program. Insurance products offered by United Agencies and its affiliates including United Insurance Partners Insurance Services, LLC. Certain restrictions apply.

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California School
Employees Association
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(AEU)

RETIREE UNIT MISSION STATEMENT: The California School Employees Association Retiree Unit envisions a strong, organized program for retirees to promote communication among all retirees, to address issues that impact their lives, and to assist CSEA's active membership in accomplishing their retirement goals.

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Visit us on the web at www.csea.com/retiree



I'm Still In!
Retiree Unit