



NEA-Retired Legislative Committee Annual Report

July 5, 2021

JoAnn Smith Mashburn, Chair

[\(joannsmi@yahoo.com\)](mailto:joannsmi@yahoo.com)

The Legislative Committee met four times during the 2020-2021 year: October 14, 2020; December 2, 2020; February 4, 2021, and April 28, 2021.

Charges

1. On the opening committee date, discuss pertinent legislative issues and how you wish to proceed with the legislative information sent monthly from NEA staff. This info should match with member concerns.
2. Using that information, compose an e-mail to be shared with Retired state presidents and urge them to share it with state members for action.
[Although nearly every month NEA staff sends an update, it is unnecessary to create a new activity or request if there is no change on an issue or no new issue.]
3. Consider, however, a monthly message to presidents and committee members. In addition, state presidents can receive news by sending it to the NEA-Retired President for inclusion in the Pres. to Pres. newsletter.
4. Direct committee members to contact state presidents requesting successful lobbying activities used within the states. The L/A Chair will compile these and share them with the retired state presidents.
5. The committee should discuss any additional activities they wish to be involved in and feel they can have the most influence.
6. Other

Accomplishments for 2020-2021

1. Committee members contacted every state president to request successful lobbying activities used within their state. As a result, the following retired state associations participated:

Alabama, Arizona, California, Colorado, Connecticut, Federal, Georgia, Hawaii, Idaho, Illinois, Indiana, Kentucky, Maine, Massachusetts, Michigan, Montana, Nebraska, Nevada, New Jersey, New York, North Carolina, Pennsylvania, Tennessee, Washington, and Wisconsin.

2. Message to members via the President-to-President newsletter published by President Sarah Borgman explaining:

A. The CPI-E vs the CPI-W - used to determine the Social Security COLA **CPI-E Experimental Consumer Price Index** The CPI-E is essentially a price index for the elderly. The Bureau of Labor Statistics (BLS) developed the CPI-E, which measures price changes in a basket of goods and services relevant to Americans 62 years and older. The CPI-E composition is different from other BLS indexes, including the consumer price index for urban consumers (CPI-U) and the consumer price index for wage earners and clerical workers (CPI-W). For example, health care costs account for 11 percent of the CPI-E and only 5.6 percent of the CPI-W. Advocates argue that Social Security cost of living increases (COLA) should reflect a price index such as the CPI-E that provides an accurate gauge of inflation rate relevant to retirees. Currently, Social Security COLA increases reflect the CPI-W--not the CPI-E.

B. GPO/WEP Social Security's Government Pension Offset (GPO) and Windfall Elimination Provision (WEP) penalize educators, police officers, and other state and local government employees who dedicate their lives to public service. According to the Congressional Research Service, the WEP affects 1.9 million people while the GPO affects 695,000 people.

C. GPO/WEP IMPACT

The WEP reduces the **Social Security retirement, disability, spousal, or survivor benefits** of people who work in jobs and pay Social Security taxes and jobs in which they do NOT pay Social Security taxes. As a result, educators who take part-time or summer jobs to make ends meet are often unfairly affected by GPO/WEP.

The GPO reduces the **Social Security spousal or survivor benefits** of people who get a government pension (federal, state, or local) but did NOT pay Social Security taxes themselves. Two-thirds of the government pension is deducted from the Social Security benefit—for example, if your monthly government pension is \$600, your Social Security spousal or survivor benefit is reduced by \$400. If two-thirds of your government pension is more than your Social Security benefit, you could lose your Social Security benefit.

These offsets **discourage people from becoming educators**, especially those in mid-career who stand to lose Social Security benefits they have already earned. That, in turn, can adversely affect the quality of the education our students receive. (From NEA Center for Advocacy)

- D. Successfully submitted an amendment to the NEA Legislative Program that the Representative Assembly adopted. It reads as follows: NEA supports “the use of the Consumer Price Index for the elderly, CPI-E, as the price index used to determine the Social Security Cost of Living Adjustment” (Page 22, Lines 34-35)
- E. Submitted an article for consideration to be published in both *NEA Today* and *NEA Today for Retired* regarding the CPI-E
- F. Requested an updated article in *NEA Today* and *NEA Today for Retired* on GPO/WEP
- G. Reviewed and discussed the Legislative Updates prepared and presented by NEA Lobbyist Dr. Sylvia Johnson. We greatly appreciate her presence and willingness to answer all our questions at each meeting of the committee.
- H. Established subcommittees to monitor bills introduced to Congress on the following **issues**:
 - Social Security**—Sue Maurer, Pat Randal, Maureen Ramos, Dr. Willie Stevens, Claudia Swisher
 - Medicare**—Frank Roder, Marlene Parker, Cheryl Binkley, Maggie Beall, Bob Drayton, Steve Wilson
 - GPO/WEP**—Crystal Ward, Pat Randal, Karen O’Connell, Dicie Smith
 - CPI-E**—Steve Horner, Walta Dodd, Linda McCrary, Barbara Schram
 - Pensions**—Maggie Beall, Mary Lou Cameron, Crystal Ward, Cheryl Binkley
- I. Renewed our commitment to the Mission, Core Strategies, and Internal Priorities of the NEA-Retired Legislative Committee as follows:

MISSION

Our mission is to safeguard the continuation of public education and protect the pension, Social Security, and Medicare, and other benefits for the retired members of NEA.

CORE STRATEGIES

- Monitor federal legislation, regulations, and policies that impact both retired NEA members and public education – active members and students.
- In collaboration with the NEA, provide strategic lobbying efforts as necessary, reaching out to elected officials, various federal departments, and other like-minded education organizations and stakeholders as appropriate.
- Keep NEA-Retired members up-to-date through various communication methodologies.

INTERNAL PRIORITIES

- Enhance and promote NEA-Retired advocacy and lobbying efforts through a comprehensive communications program that may include some of the following *in the future*: telephone town halls, webinars, social media, and e-newsletters.

MEMBERS OF THE 2022-2021 LEGISLATIVE/ADVOCACY COMMITTEE ARE:

| | |
|----------------------|---|
| Sarah Borgman | Indiana, NEA-Retired President |
| Maggie Beall | Pennsylvania |
| Cheryl Binkley | Virginia |
| Mary Lou Cameron | New Mexico |
| Myles Cohen | Connecticut |
| Phyllis Compton | Florida |
| Minie Coon | Alabama |
| Walta Sue Dodd | Nebraska |
| Bob Drayton | Florida |
| Marti Frank | Ohio |
| Steve Horner | Nevada |
| David Johnson | Alabama |
| Robert Love | Louisiana |
| Susan Maurer | New Jersey |
| Linda McCrary | Tennessee, NEA-Retired Executive Council |
| Luci Messing | Arizona |
| Karen O'Connell | Connecticut |
| Marlene Parker | Virginia |
| Maureen Ramos | Washington |
| Pat Randal | North Carolina |
| Alen Ritchie | California, NEA-Retired Executive Council |
| Frank Roder | Florida |
| Barbara Schram | Michigan |
| Diccie Smith | Tennessee |
| JoAnn Smith Mashburn | Tennessee, NEA-Retired Executive Council |
| Dr. Willie Stevens | North Carolina |
| Loretta Tisdale | Illinois |
| Claudia Swisher | Oklahoma |
| Crystal Ward | Maine |
| Inez Wilkerson | Georgia |
| Lynda Wolfe Smith | Georgia, NEA-Retired Executive Council |
| Steve Wilson | Indiana |