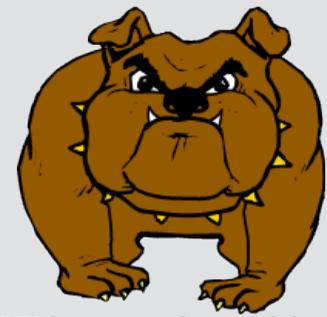




# THE WATCHDOG REPORT

THE OFFICIAL PUBLICATION OF MISSOURI RETIRED TEACHERS ASSOCIATION AND PUBLIC SCHOOL PERSONNEL



MRTA is your pension watchdog!

## 2022 End of Session Report

### State Budget Includes Funding Increases for Education

Since the Missouri General Assembly began the 2022 Legislative Session on January 5, 2022, there were more than 2,200 bills introduced. MRTA monitored and tracked almost 400 bills this year. The 2022 Legislative session adjourned for the last time this year on May 13, 2022. There is good news for the education community regarding the budget. The Missouri General Assembly passed the \$49 billion state budget with over \$10 billion to help education. This budget was the largest budget passed in Missouri history. The budget includes DESE's \$10 billion budget. Below are some of the funding increases:

Funds to increase teacher pay, including:

- Fully funding Governor Parson's recommendation to increase the baseline teacher salary from \$25,000 to \$38,000 through a matching grant program.
- The state will provide local school districts with funds to support 70 percent of the salary costs associated with the program; local school districts would have to provide the remaining 30 percent.
- Just over \$37 million to restart the Career Ladder Program currently in state law, which allows teachers with at least five years of experience to earn extra money for participating in additional activities in the school setting.
- A one-time increase of \$214 million to support transportation in public schools, fully funding the maximum 75 percent of reimbursable costs for the first time since 1991.



Revenue estimates made in December 2021 indicated that the current fiscal year will *Continued on page 3.*

### Starting a New Chapter for MRTA

MRTA has successfully advocated for Missouri public school teachers and personnel since its inception in 1960 and we want to continue that endeavor. We want to make sure that we continue to show the strength of MRTA. The political and economic landscape has changed and evolved post-Covid. Now, under new leadership, the organization is giving itself an upgrade, reinventing itself with a forward-looking vision to collaborate, grow and strengthen MRTA.

We hope you have enjoyed the articles we shared over the past few weeks, introducing ourselves to *Continued on page 6.*

#### FEATURES

MRTA President's Message.....pg. 3	MRTA Silent Auction/ Golf Tournament.....pg. 10
Thank Your Legislators .....pg. 5	4 Reasons Why Retirees Need MRTA.....pg. 11
Teacher Appreciation Week.....pg. 6	MRTF President's Message..... pg. 12
	...and so much more!

# MRTA President's Message

By Nancy Craig, MRTA President



When you read this, I will have ONE Region left to visit on my MRTA Road Trip across our beautiful state. In the past few weeks, I have put over a thousand miles on my car, spent a couple of nights near Stockton Lake in "The Bears Den" and found a favorite road for cross-state trips, which takes me right by a favorite restaurant. It has been an adventure and I now understand why MRTA Presidents only serve ONE term.

My trusted travel partner, Linda Taber and I have been within a few miles of the Tennessee/Arkansas border when we visited the Bootheel area. We have also been a few miles (on my favorite road - Hwy 36) from the Iowa border. The middle of the state has some interesting highways as we traveled north to south stopping in Jefferson City for supplies. Did I tell you it has been an adventure AND that we have become experts following our GPS? Well, not quite experts. We are, however, better than we were when we were lost in Carthage on our first trip.

My other travel partner, Pat Lane and I spent three days near Stockton Lake with two Regions staying two nights in The Bears Den. If you are ever in that area, we would recommend that you check out The Cabins at Stockton Lake. They are not ON the lake. They are close to the lake and were very nice. Not too many interstate highways in these areas, which was all right with us. We have spent some hours on our Interstate highways dodging 18 wheelers. Did I tell you it has been an adventure?



My main theme started out being about rebuilding/rebranding MRTA, which was the theme at the Presidents' Summit in Columbia this year. If you are in that area, you might check out Stoney Creek Hotel with its bears, horses and large animals on the lawn. We have been joined by our new Executive Director, Maria Walden, on this last leg of our adventure. It has been such a pleasure hearing her positive message across the state. Maria has been a positive role model for ALL of us. She has definitely been busy with the Legislative Session and visiting Region gatherings since April following the March Presidents' Summit. The message has been "WE can do this!!" MRTA is rebuilding and getting stronger. We have to be strong advocates for the active teachers across the state because they CANNOT advocate for themselves. We have to protect THEIR pensions because there is definitely "pension envy" in the Capitol building. MRTA has to be involved. YOU have to find YOUR purpose and become active. That is the only way that MRTA is going to survive and get better and stronger.

"THANK YOU" to all of the Presidents of Units and Region Vice Presidents who have made us feel welcome, fed us well and listened to us speak about how MRTA is going to grow and be better.

Until NEXT time,

Nancy Craig - Proud MRTA President 2021-22

## 2022 End of Session Report - Continued from page 1.

end June 30 with almost \$3 billion in surplus general revenue, by far the most in state history. Since those estimates were made, revenues have far exceeded expectations. Missouri has unprecedented amounts of surplus general revenue. State revenues are growing at a strong pace and will generate as much as \$2 billion in additional surplus revenue by end of fiscal 2023.

The budget also sets aside \$500 million for a deposit in the Missouri State Employee Retirement System (MOSERS) fund to lessen the need for future contribution increases, which receives contributions to the retirement plan from General Revenue. The budget does not set aside any additional funding for Public School and Education Employee Retirement Systems of MO (PSRS/PEERS), St. Louis Public School Retirement System, and Kansas City Public School Retirement System, due to the fact that those retirement systems receive their funding from employees and employers directly and the systems are prevented by statute from accepting general revenue directly. The budget bill now heads to Governor Parson's desk for signature.

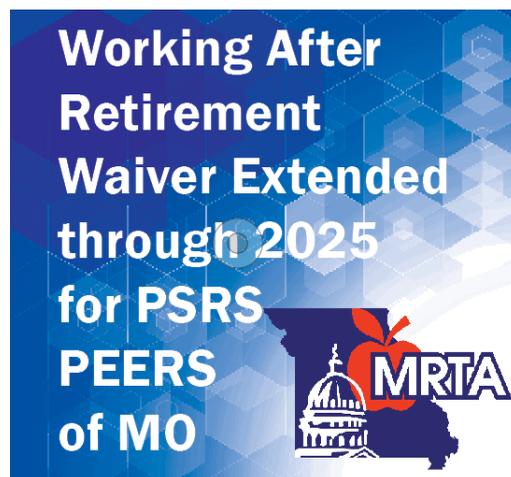
In a last-minute surprise, the Senate adjourned late Thursday, May 12th leaving some legislation for the House to consider on Friday. No bills negatively impacting PSRS/PEERS of Missouri, PSRS/PEERS of St. Louis, or PSRS/PEERS of Kansas City, MO were passed this session.

**MRTA testified on several bills this year that had an impact on the retirement systems. Retirement legislation that MRTA supported, which passed included:**

SB 681 waives the working after retirement statute for any work performed by PSRS/PEERS retirees working in **substitute teaching positions only**. This legislation will have an impact on our retiree's ability to return to work for covered employers. On August 7, 2020, Governor Parson signed a waiver of the 550-hour / 50% salary working after retirement statute. This waiver was to address the substitute teacher shortage our school districts were facing during COVID. It was in effect until December 31, 2022. If the Governor signs this legislation, it will continue waiver of working after retirement and be in effect until June 30, 2025.

**MRTA testified on several bills this year that had an impact on the retirement systems. Retirement legislation that MRTA supported, which did not pass included:**

- Working-After-Retirement changes that would allow the retiree to earn in any one school year 25% of the person's highest annualized final average salary.
- Providing a 2.55% benefit factor for PSRS of MO retirees who retire with 32 years or more of service. This would have been a cost savings to the system as well as a pension boost to the retiree. This also would have made an impact on keeping qualified teachers in the classroom and lessened teacher shortage.
- Critical shortage provisions that would increase the limit on retirees being able to work under critical shortage from two years to four years. This bill would have made a positive impact on the substitute teacher shortage by allowing retirees to work longer under the critical shortage provision.
- Legislation that would have changed the post-retirement salary limit for PSRS members working in PEERS positions to the Social Security limit through June 30, 2025.



*Continued on page 4.*

## 2022 End of Session Report - Continued from page 3.

All these bills would have benefited school districts, Missouri's school children and retirees by having a qualified, retired teacher substitute teach and providing an opportunity for qualified teachers to stay in the classroom longer.

### Retirement Legislation that MRTA opposed which did not pass included:

- Legislation requiring defined benefit plans in Missouri to invest at least 20% of their venture capital in Missouri owned businesses and real estate. This would have negatively impacted PSRS/PEERS by limiting their investment potential by \$1.5 billion. The language that would have impacted the teacher retirement plans was removed from this legislation after an MRTA Call to Action. Thank you to all members who voiced their concerns!

### Education bills that passed included:

- ESSER III funding to school districts. These federal funds provided needed funds to school districts to help fill staffing shortages and help with other shortfalls. Supplemental budget bill appropriated \$1.9 billion in federal ESSER III funding to school districts. The bill authorizes over \$4.5 billion to be utilized in the current fiscal year. MRTA supports legislation that increases funding to our public schools. (HB 3014)
- Funding increases for public education. This legislation added \$214 million for transportation, \$37 million for Career Ladder, \$32 million for teacher pay, and \$45 million for literacy grants. MRTA supports legislation that increases funding to our public schools. (HB 3002)
- Charter school expansion. MRTA opposes charter school expansion as it takes away tax revenue away from public schools. (HB 1552)
- Omnibus Senate Education Bill. This bill originally dealt with reading instruction and literacy. The version that was finally truly agreed to and finally passed contains many of the education issues that were non-controversial. This provision also contains the waiver of working after retirement provision for substitute teachers and can be found in chapter 168.036, RSMo. (SB 681)

For a bill to become law, it must be passed by the Missouri House and Senate, those bills are referred to being truly agreed and finally passed. The General Assembly truly agreed and finally passed (TAFP) 65 bills this year, of which 19 of those were appropriation bills. After a bill has been TAFPed it goes to the governor for his signature or veto. The governor has until July 14 to sign or veto legislation.

MRTA has played a proactive role this legislation session. Our Executive Director met with numerous elected officials this year to discuss legislation that would assist or harm our retirement systems. Thank you to our MRTA members who were active and engaged. You made a difference!

## MRTA State Leadership

### PRESIDENT

Nancy Craig  
314-440-2254  
ncraig8678@yahoo.com  
Valley Park, MO

### VICE PRESIDENT

Maureen Hacker  
573-473-8537  
mbhacker@charter.net  
Mexico, MO

### RECORDING SECRETARY

Sandy Applegate  
St. Louis, MO

### MRTA State Office

3030 DuPont Circle  
Jefferson City, MO 65109  
1-877-366-6782  
mrta@mrta.org  
www.mrta.org

### PRESIDENT ELECT

Martha Schatz  
417-414-5900  
tmschatz@sbcglobal.net  
Billings, MO

### PAST PRESIDENT

Arleta Godwin  
660-679-6410  
artiedoll@gmail.com  
Montrose, MO

### TREASURER

Julia Platt  
Eldon, MO



## Thank Your Legislators!

MRTA staff works hard to build a relationship with legislators to help further our cause. There are a few legislators who have been very supportive of MRTA this year. We would like to thank them and encourage you to do the same. Special thanks to:

- Senator Karla Eslinger
- Senator Elaine Gannon
- Representative Patricia Pike
- Representative Paula Brown
- Representative Richard Brown
- Representative Rusty Black

These legislators took the time to make special videos for our members during MRTA Legislative Day as well as supporting public education and our retirement system.

We also invite you to contact your representatives and senators that have been wonderful advocates for your retirement and public education. A handwritten note or email goes a long way after session is finished. If your legislators have not always been supportive of public education or your retirement system, consider a note thanking them for their public service and asking them to consider being supportive in the future.

Use the QR code below to find your legislators' contact information. Thank you for taking the time to write and build a relationship with your legislators! You make a difference!



## Teacher Appreciation Week

MRTA staff thanked teachers at local schools by bringing them cookies and applications for \$500 MRTF Grants and \$500 Maggie Elder Memorial Support Staff Grants. Blitz also made a personal appearance to the delight of everyone!



## Starting a New Chapter for MRTA - Continued from page 1.

you. Our goal is to help you feel like you know us a little better. Just as important, we want to get to know all of you better, too.

Why? Because we are your team. As we have done in the past, we want to make sure that we are dedicated to meeting the needs of our members. In our last newsletter, we reported that we are taking MRTA in a dynamic new direction, maintaining our strength but becoming more proactive as our environment has changed. One that will keep the organization relevant and out in front, working for our educators, our public schools, and our public school retirement systems.



But first, we are focusing on some fundamental planning. We are working to update and improve our strategic plan, vision and mission statement, building a foundation for all of our work going forward. Then, the work begins in earnest, and we need your help.

Your ideas and your opinions are the driving force of MRTA, and we will be reaching out to you for your feedback, opinions and ideas. We will be sending a survey out to our membership to see what issues they find to be of utmost importance. We strongly believe that this type of collaboration will give us the knowledge we need to provide a better experience for our members and make MRTA stronger.

At the same time, we will work with other Missouri educational associations whenever possible to help ensure we can meet our common goals to strengthen and improve public education in Missouri. A vibrant, thriving public school system benefits everyone in Missouri, as well as our state economy, state and local communities, and our pension systems.

Throughout the process, we are committed to continuing to improve our communication with you, to keep you as informed as possible. Look for exciting new changes to our publications and our website. And of course, stay in touch with us on social media.

Positive change is on the way as we start a new chapter for MRTA!

## Starting a New Chapter for MRTA

### Maria Walden MRTA Executive Director



If you have ever been around Maria Walden, you know that her energy, confidence and “get it done” attitude brighten up any room almost as much as her laugh does.

As MRTA Executive Director, Maria is here for positive change. She has only been on the job since February, but she jumped in with both feet from the start.

“I believe this position is such a phenomenal opportunity,” Maria said. “We have the chance to grow and strengthen MRTA by working strategically and proactively on good, solid legislation that supports our mission, our members, and our public schools. It continues my advocacy work on ensuring that our public school teachers and personnel have a secure and financially stable retirement.”

Maria is no stranger to the cause and may be a familiar face to many MRTA members, as she served almost 15 years as the director of legislation and policy with the Public School and Education Employee Retirement Systems of Missouri (PSRS/PEERS).

In 2018, Walden received the MRTA Watchdog of the Year award for her work regarding pension issues in Missouri.

She will continue to put her extensive knowledge of the retirement systems to work for Missouri public school educators and personnel.

“Without strong public schools there won’t be a strong retirement system,” she said. “MRTA is here to help ensure that the retirement systems stay

strong for our teachers and school personnel, now and into the future. Our teachers, administrators and public school personnel are the heart of our local communities.”

Walden also has extensive experience working with elected officials, collaborating and building consensus with other entities who support state retirement systems, and communicating effectively with multiple audiences.

In addition to her work at PSRS/PEERS, she served as the assistant executive director for the Missouri Parks and Recreation Association, and in leadership roles for the Missouri Department of Insurance, Financial Institutions, and Professional Registration.

One of her first projects at MRTA is working with a task force of MRTA leadership to develop a new strategic plan that clearly identifies and reinforces the mission, vision and goals of the association.

“We have already started building a new culture at MRTA, a culture that involves not only a new approach to how we do business, but also a more collaborative effort with the education community,” she said. “Our goal is to improve both public education and the lives of our members. We need a strategic plan that will help us achieve these positive changes.”

Richard Phillips, Chair of the MRTA Executive Director Search and Selection Committee said, “MRTA is going through a profound and dynamic shift in the foundation of the Association. This shift will go unnoticed by most of our members, yet this shift is increasing the effectiveness and efficiency of the Association that is led by Maria. Maria has hit the ground running as she started in the middle of this legislative session. Maria has also tackled some big projects while juggling her work at the Capitol, she has been working through and updating poli-

cies and procedures, embarking on a financial audit that will establish best accounting practices, starting work on a strategic plan, and starting the process for a statewide message about, “What is Right about Public Education,” to name a few. She has a very good team that is thriving under her leadership and direction.”

Maria added, “MRTA members give so much to their schools and communities. For me, it’s just giving a little bit back.”

Maria is married to Steve. They have two amazing boys and three golden retrievers. She loves being outside whether hiking, gardening, or kayaking. She especially loves spending time with her family. She resides in Jefferson City, Missouri.

### Sarah Hoeller MRTA Assistant Executive Director

For almost 15 years, Sarah Hoeller has been using her talents to help ensure Missouri public school teachers and personnel have a secure retirement.



As Assistant Executive Director, Sarah is a key member of the organization’s small but efficient office staff in Jefferson City. When asked, she describes her job as basically whatever it takes to get things done – and she says it with a smile.

The focus of her work, though, is communications. Sarah is in charge of all communications from the MRTA office, including emails, newsletters, and social media updates. Good communication is critical for the organization with such a large membership covering the entire state. Sarah makes sure mem-

## Starting a New Chapter for MRTA - Continued from page 5.

bers stay well-informed about events, opportunities, and potential legislative changes through constant communication.

"Sarah has so much knowledge and history of MRTA," said Maria Walden, Executive Director. "She has such passion for MRTA's mission and vision. Her passion is contagious to everyone that works with her."

She reflected on the days when her work with MRTA began and just how much progress has been made, not only on behalf of the members, but in the office itself.

"A thing that was surprising to me when I started working for MRTA was that, we were running this huge organization, impacting so many people and getting so much done, and there were only three people on staff working out of a tiny rented office" Sarah said.

While the office environment at MRTA has changed, it's a passion for the cause that has been at the root of it from the beginning.

"We have come a very long way since I started working here," Sarah said. "We are all so excited for all the change that is about to happen for MRTA. Our members already are starting to see the change in our publications, website and emails."

Under the leadership of new Executive Director Maria Walden, Sarah and the rest of the team at the MRTA office are ready to gear up even more. She added, "We get to work with MRTA's first ever female executive. We have the opportunity now to move the organization forward."

For Sarah, it's personal. "If it wasn't for my public school and a few really caring teachers, I wouldn't be the successful person I am today," she said.

"We provide different things for differ-

ent people. There's the whole social aspect of it, keeping them informed and the work we do for public schools," she said. "But realistically, at the end of the day, literally the most important thing we do is protect their retirement. That's what we are here for."

### Paige Holtmeyer MRTA Database Specialist



Paige Holtmeyer has been with MRTA for six years. She is in charge of everything related to the MRTA database. That database contains information on over 30,000 MRTA members, as well as potential members and public schools. It is this information that the entire organization depends on to do their jobs and serve our members.

It's no small task. The database must be kept confidential, and as accurate and as complete as possible for the best outcome. While this might seem daunting to some, Paige takes on the challenge with confidence and with pleasure.

And while being a database specialist might sound technical, for Paige, it's all about the human connection. Her work to ensure the integrity of the MRTA database helps the organization inform and serve Missouri public school teachers and personnel, and ultimately help protect their secure retirement benefits.

Paige also handles incoming payments and works with public schools, who sometimes help pay MRTA dues for first-year members as a way to get them involved and allow them to learn about the benefits MRTA can provide.

Recently, she has become more involved with statewide meetings and

is helping with planning and logistics for events such as board meetings and conferences. She works to ensure the host hotels, attendees and presenters all have what they need, before, during and after an event.

"Paige has been instrumental in assisting with our Summit and Annual Conferences. She has such a positive, can-do attitude and makes the task of hosting conferences fun and stress-free for our members," said Maria Walden, Executive Director.

For Paige, MRTA is a fulfilling place to work. "The office dynamic here is positive and productive," she said. "With Maria as our new director, there is even more of an atmosphere for change and opportunity."

One of her favorite things about the job is the way the office team brainstorms ideas.

"No idea is too crazy," she said. "We like to bounce ideas off each other and we are comfortable doing so. The results benefit our members and our legislative advocacy, and that's what it's all about making sure our members have a secure retirement."

Paige lives in St. Elizabeth with her husband Trenton and two kids, Wade and Wyatt. They enjoy the small-town life and love being on the farm. Paige spends most of her time chasing after her two little ones, but in her free time she loves crafting, traveling, and watching movies.

### Morgan Piening MRTA/MRTF Administrative Assistant

At the MRTA office in Jefferson City, Morgan Piening wears a lot of hats. Although she has only been

