



## California Retired Teachers Association

### *Legislative Accomplishments 1982 to 2024*

#### **2024**

##### **Successfully Promoted Retiree Priorities: Health Care/Healthy Aging: Bills signed into law:**

- AB 2207(Reyes): Will increase representation from older adults on a number of key California Boards and Commissions.
- AB 2258 (Zbur): Protects individuals from being charged cost-sharing requirements for items or services that are needed for preventive care services and screenings, including cancer screenings.
- AB 2270 (Maienschein): Expands what continuing education and professional development doctors and therapists can take to include menopausal mental and physical health.
- AB 2297 (Friedman): Allows emergency doctors to find discounts for patients, prohibits a hospital from considering monetary assets of a patient to determine eligibility, and prohibits a hospital or emergency doctor from using liens on property to collect unpaid hospital or emergency physician bills, and collection agencies.
- AB 2620 (Bains): Reduces the number of members on the Commission on Aging and requires them to have experience in the field of aging, including health, behavioral health, and housing.
- SB 1354 (Wahab): Requires long-term health care providers under Medi-Cal to provide services to Medi-Cal members with the same care and scope provided to others.
- SB 1406 (Allen): Adds the right for a resident in a residential care facility for the elderly to request, refuse, or discontinue a service, eliminates the exemption from rent control for their facilities and prohibits annual fee increases for residents from being higher than 10 percent or the annual Consumer Price Index for the previous year, except for rate increases due to a change in the level of care.

##### **Public Education: Bills signed into law:**

- Proposition 2/AB 247 (Muratsuchi): Created a \$10 billion bond to build schools with \$8.5 billion going to K-12 schools and \$1.5 billion for community colleges. These funds would be able to be used for both new construction and modernization.
- SB 956 (Cortese): Reauthorized K-12 districts to use the design-build delivery method when constructing and designing school facilities.

##### **Retirement: Bills signed into law:**

- AB 1997 (McKinnor): Simplified reporting requirements regarding creditable compensation and creditable service towards addressing challenges and concerns by CalSTRS employers and members to provide reporting consistency.
- AB 2134 (Maratsuchi): Allows teachers and classified employees who change school districts to keep their earned sick leave.

#### **2023**

##### **Both 2022 CalRTA-Sponsored Bills Enacted and Implemented by CalSTRS**

- Successful implementation of SB 868 (Cortese), which increased purchasing power for retirees who retired prior to 1999. Increases began in purchasing power checks sent in October 2023. In total, 45,944 retirees received an SB 868 increase. 35,542 received a 5% increase (retired between 1990-1998), 9,222 received a 10% increase (retired between 1980-1989), and 1,180 received a 15% increase (retired prior to 1980).



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

- Successful implementation of AB 1667 (Cooper), which protects retirees from having to pay for mistakes made by districts or the California State Teachers' Retirement System (CalSTRS) while also making the CalSTRS audit process more transparent and accountable. During the first quarter of 2023, a total of 173 instances of overpayments were made across the state. These overpayments impacted 157 retired members who were not required to pay for mistakes they did not make.

#### **Provided a Statewide Voice for Retired Teachers**

- CalRTA organized and chaired the statewide Retired Educators Coalition, which consists of organizations that advocate on behalf of retired teachers and/or school employees.
- Represented retired teachers at all meetings of the Teachers' Retirement Board, which oversees CalSTRS. Also participated in over 20 meetings with CalSTRS leadership regarding implementing current legislation, creating future legislation, and identifying issues that need to be addressed.
- Advocated to the Legislature in support of 10 health care/healthy aging bills that would provide greater protections for policy holders and would reduce overall health care and prescription drug costs. Successfully advocated in support of retirement legislation to provide greater transparency in the CalSTRS audit process.

#### **Spearheaded National Efforts to Repeal the WEP and GPO**

- Supported and advocated for H.R. 82 (Graves - LA) and S. 597 (Brown - OH) the Social Security Fairness Act of 2023, which called for full repeal of the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).
- In March, held successful CalRTA Advocacy Days in Washington, D.C. with 36 members and leaders, who met in-person with over 50 elected Representatives and Senators.
- Successfully maintained an active Legislative Alert System, sending over 140 legislative alerts, which helped garner 304 cosponsors for H.R. 82 (Graves - LA) in the bill's first year.
- CalRTA's State President co-chaired the National WEP/GPO Repeal Task Force, which provided a voice and exposure for CalRTA at the national level. She met weekly to organize national alerts, to update the WEP/GPO Repeal website, and to strategize with elected officials.
- In September, in coordination with the National WEP/GPO Repeal Task Force, CalRTA President helped successfully organize a Washington, D.C. Lobby Day with leaders from the following organizations:
  - Judy Beard – Political & Legislative Director, American Postal Workers Union (APWU)
  - Noel Candelaria – Secretary-Treasurer, National Education Association (NEA)
  - State Representative Mike Johnson – District 27, Louisiana
  - Ed Kelly – President, International Association of Fire Fighters (IAFF)
  - Everett Kelley – President, American Federation of Government Employees (AFGE)
  - Katie Maddocks – Legislative & Political Director, National Postal Mail Handlers Union (NPMHU)
  - Max Richtman – President and CEO, National Committee to Preserve Social Security and Medicare (NCPSSM)
  - Robert Roach – President, Alliance for Retired Americans (ARA)
  - William Shackelford – National President, National Active and Retired Federal Employees Association (NARFE)
  - Gene Sokolowski – EDU, President, PASI: Polish American Strategic Initiative
  - Dan Toth – Director of Retired Members, National Association of Letter Carriers (NALC)
  - Randi Weingarten – President, American Federation of Teachers (AFT)



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

- CalRTA's State President spoke at the National H.R. 82 Press Conference in Washington, D.C. on behalf CalRTA members.
- Following the National Press Conference, CalRTA President, State Legislative Chair, and CEO met with the staffs of key Congressional leaders.
- As a direct result of the increased attention on H.R. 82, the U. S. House of Representatives Ways and Means Committee held a Field Hearing on the bill. This was the first time in 2023 the repeal of the WEP/GPO had come before the Committee.

## **2022**

### **Both CalRTA-Sponsored Bills Signed by Governor**

- Successfully sponsored SB 868 (Cortese), which will increase purchasing power for California's oldest retirees. The legislative process included multiple policy and fiscal hearings at the State Capitol, 30 meetings with legislative offices, multiple meetings with CalSTRS regarding the bill and its implementation, and meetings with the Department of Finance and the Governor's Office.
- Successfully sponsored AB 1667 (Cooper), which will protect retirees from having to pay for mistakes made by districts or the California State Teachers' Retirement System (CalSTRS) and will reform the CalSTRS audit process. The legislative process included multiple policy and fiscal hearings at the State Capitol, over 30 meetings with CalSTRS and additional sponsors, over 30 meetings with the sponsors and stakeholders, over 30 meetings with Capitol staff, and multiple meetings with the Department of Finance and the Governor's Office.

### **Spearheaded National Efforts to Repeal the WEP and GPO**

- Supported and advocated for H.R. 82 (Davis - IL) and S. 1302 (Brown - OH) the Social Security Fairness Act of 2021, which called for full repeal of the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).
- Supported section 110 of H.R. 5723 (Larson - CT) regarding the repeal of the WEP and GPO.
- Successfully maintained an active Legislative Alert System, sending over 140 legislative alerts, which helped garner 305 cosponsors for H.R. 82 (Davis - IL).
- CalRTA's State Legislative Chair co-chaired the National WEP/GPO Repeal Task Force, which provided a voice and exposure for CalRTA at the national level, meeting weekly to organize national alerts, the WEP/GPO Repeal website, and meeting with elected officials.
- In May, in coordination with the National WEP/GPO Repeal Task Force, CalRTA held a Washington, D.C. Lobby Day with many Congressional Representatives and our U.S. Senators. The rally helped secure additional cosponsors for H.R. 82 (Davis - IL).
- In July, CalRTA's State Legislative Chair was asked to speak at a National H.R. 82 Press Conference in Washington, D.C. on behalf CalRTA members.
- In Washington, D.C. in September, CalRTA State Legislative Chair, Vice Chair and CEO met with the staffs of key Congressional leaders and the Secretary of Education.
- U. S. House of Representatives Ways and Means Committee held a hearing on H.R. 82; this was the first time the repeal of WEP/GPO had come before the Committee as a result of the increased attention.

### **Maintained Focus on State Issues Affecting Retirees**

- Held a successful state Advocacy Week in March with 36 members traveling to Sacramento to meet with over 50 State Assembly Members and State Senators to advocate in support of CalRTA's



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

sponsored bills: SB 868 (Cortese) and AB 1667 (Cooper).

- Supported three state bills relating to teachers' retirement, while taking a watch position on two additional retirement bills.
- Supported eight state bills related to health care/healthy aging.
- Supported one state bill regarding public education.
- Took positions on three state initiatives that could have impacted public education.
- Held over 40 meetings with state Legislators and staff regarding CalRTA priorities.

#### **Strengthen Coalition Building and Presence at CalSTRS**

- Chaired the Retired Educators Coalition, which is made up of organizations from K-14 that represent retirees, to coordinate organizational goals and priorities.
- Legislative Chair held regular meetings with new CalSTRS CEO Cassandra Lichnock.
- Set up regular meetings with Teachers' Retirement Board Trustee Karen Yamamoto.
- Represented CalRTA members at every Teachers' Retirement Board Meeting as well as at stakeholder meetings held by CalSTRS staff.
- Held nearly 20 meetings with CalSTRS staff and Trustees to represent CalRTA members, separate from meetings regarding sponsored legislation.
- Collaborated with educational stakeholder groups on a regular basis.

#### **Increased CalRTA Member Outreach**

- Conducted CalRTA Legislative Platform Survey.
- Adopted the 2023/24 CalRTA Legislative Platform based on members' top priorities in CalSTRS Retirement, Social Security and Federal Issues, Health Care/Healthy Aging, and Public Education.
- Developed publications on Non-Partisan/Partisan and Non-Education Candidates, Virtual Advocacy, How to Be the Best Advocate, as well as monthly state legislative updates.
- Conducted multiple webinars, including educational workshops for the Government Relations Committee, and workshops regarding how part-time community college faculty are impacted by the WEP/GPO.

#### **2021**

- Supported numerous federal bills, including H.R. 82, which would repeal the WEP and GPO.
- Successfully moved AJR 9 (Cooper) through the California Legislature, which urges Congress to pass, and the President to sign, the repeal of the WEP/GPO.
- Stopped SB 457 (Portantino) from moving forward, which would have restructured CalSTRS' Investment Division, costing billions administratively, and in investments.
- Stopped AB 1019 (Holden), which would have cost CalSTRS millions from divestment.
- Supported the 0.5 percent increase in the state's contribution to the CalSTRS Defined Benefit Plan, as well as catch-up funds to keep CalSTRS on track towards full funding.
- Supported 14 state bills that would improve health care, health care facilities, mental health, affordable prescription drugs, and health access.
- Stopped the Marin County Office of Education from passing a resolution inaccurately disparaging CalSTRS and the importance of pensions.
- Prevented CalSTRS from moving forward with a proposal to permanently penalize retirees caught up in negative CalSTRS audits by having their retirement checks reduced and being forced to pay back



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

three years' worth of overpayments.

- Collaborated with educational stakeholder groups to work on a solution addressing CalSTRS audits that would negatively impact retirees who were not responsible for errors that would reduce their retirement benefits.
- Chaired the Retired Educators Coalition made up of organizations from K-14 that represent retirees to better coordinate organizational goals and priorities.
- Set up regular meetings with the new CalSTRS CEO Cassandra Lichnock.
- Set up regular meetings with Teachers' Retirement Board Trustee Karen Yamamoto.
- Represented CalRTA members at every Teachers' Retirement Meeting as well as stakeholder meetings held by CalSTRS staff.
- Held successful federal Advocacy Weeks in both March and October meeting with Congressional Representatives as well as our State Senators. We have held over 70 virtual and in-person meetings in 2021 resulting in numerous co-sponsors for H.R. 82 (Davis - IL).
- Held close to 40 meetings with CalSTRS staff and Trustees to represent CalRTA members.
- Held over 60 meetings with State Legislators and staff regarding CalRTA priorities.
- Conducted 16 webinars, including a joint webinar with the National Institute on Retirement Security, Virtual Advocacy, Navigating the Website, Government Relations Committee, California Part-time Faculty Association, Major Issues Facing CalSTRS, and Working Together for a Secure Retirement.
- Provided educational information to CalRTA members impacted by increases to the CalPERS Long-Term Care plan and urged the CalPERS Board not to increase rates on members.

### **2020**

- In February, traveled to Washington, D.C. for in-person meetings with 30 Representatives, committee members, and the Women's Bi Partisan Caucus; hand-delivered Advocacy packets for WEP/GPO repeal at 70 offices.
- Quickly moved to a virtual platform to continue advocacy efforts including committee meetings, scheduling elected official meetings (met with 10 Representative's staff from other states) and providing eight informational webinars on state and federal issues.
- Organized and implemented targeted weekly Legislative Alerts – with a total of 98 for the year – requesting additional co-sponsors for H.R. 141 and including repeal in a stimulus bill.
- Contacted over 70 Senators from throughout the United States requesting they co-sponsor S 521 and include repeal in a stimulus bill.
- As a result of regular advocacy, H.R. 141 ended the 116th Congress with 264 co-sponsors.
- Continued to meet with the Retired Educators group to collaborate on retirement issues, as well as to support or oppose legislation affecting retirees.
- Worked closely with CalSTRS to educate members on CalSTRS financial solvency, divestment, the state budget, and the financial solvency of CalSTRS.
- Advocated to CalSTRS for the need to eliminate the existing requirement that retirees pay back funds when a district makes a reporting error to CalSTRS.
- Supported the following bills that were chaptered: AB 2101: Ensures teachers do not lose CalSTRS credit for administrative time off due to COVID-19; SB 852: Prescription Drug costs.
- Supported over 30 additional bills that did not move forward due to the redirection of the legislator's focus on the COVID-19 pandemic and economic downturn.



California Retired  
Teachers Association

*Legislative Accomplishments 1982 to 2023*

**2019**

- Connected with all 55 California members of Congress during Lobby Day in Washington, D.C., to discuss and provide information on the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).
- Co-Sponsored the successful Senate Joint Resolution 3 (SJR 3) by Senator Wilk, urging Congress to pass, and the President to sign, full repeal of the WEP and GPO.
- Organized monthly advocacy activities to educate and request co-sponsorship of H.R. 141. By the end of December 2019, we had increased co-sponsors to 235.
- Formed retiree group coalition to actively work together to support or oppose legislation that affects retirees.
- Supported the following bills that have been chaptered: AB 706: Eliminates limits on Community College academic employee's transfer time; AB 414: Health care coverage; AB 657: Long-term care insurance; AB 48: education finance; AB 1505: Petitions and renewals of Charter Schools; and AB 1507: Charter Schools location.
- Strengthened the CalSTRS Retirement Coalition to focus on collaborating on legislation and the financial solvency of CalSTRS.
- Coordinated a coalition letter in support of Karen Yamamoto as Retiree Representative to the Teachers' Retirement Board.
- Achieved additional District and State funding to provide a supplemental payment to CalSTRS. This action provided additional resources to CalSTRS while solidifying Governor Newsom's commitment to both a defined benefit plan and to the solvency of CalSTRS.

**2018**

- Co-Sponsored the successful Assembly Joint Resolution 41 (AJR 41) urging Congress to pass, and the President to sign, full repeal of WEP and GPO.
- Helped defeat SB 1031 and Assembly Constitutional Amendment 31 (ACA 31) that were pension cut proposals, as well as AB 2217 and SB 539 that would have hurt K-14 funding.
- Supported K-12 funding adequacy legislation AB 2808, senior patient protection legislation AB 2275, AB 2941, AB 3087, and SB 1191, and for health insurance access AB 2430 and SB 1046.

**2017**

- Helped block school voucher proposal in federal budget.
- Successful Lobby Day in Washington, D.C., with more than 50 meetings on Social Security equity with California members of Congress.
- Blocked California legislation trying to use the Teacher Retirement Fund for political purposes.

**2016**

- Increased CalRTA recognition statewide because President Ken Hewitt was a signer of the State ballot argument for Proposition 51 (state school bond) and was featured on Proposition 51 campaign mailings.
- Raised \$67,000 for the successful Yes on Proposition 55 campaign to keep funding for schools.
- Supported repayment of \$57 million to the State School Land Bank borrowed by the State for the General Fund. Revenue from the Land Bank Fund helps support the Supplemental Benefit Maintenance Account (SBMA).



California Retired  
Teachers Association

*Legislative Accomplishments 1982 to 2023*

**2015**

- Successfully reintroduced bills (HR 973 and S 1651) to repeal the Windfall Elimination Provision (WEP)
- and Government Pension Offset (GPO) Social Security penalties.
- Supported the WEP penalty reduction legislation (HR 711).
- Successfully mitigated the Medicare Part B and Part D cost increases for individuals affected by the Social Security Penalties WEP and GPO.
- Connected with all 55 California members of Congress during Lobby Day in Washington, D.C., to discuss and provide information on the WEP and GPO.
- Passed CalRTA co-sponsored Senate Joint Resolution 1 to urge Congress to repeal the WEP and GPO.

**2014**

- Achieved full funding for CalSTRS with a 32-year target. Without this action the unfunded obligation would have ballooned from \$72 billion to \$167 billion. Our March 2014 Advocacy Day focused on CalSTRS full funding and educating legislators.
- Successfully opposed a pension ballot initiative – in fact the issue never even made it on the ballot.
- Successfully advocated for the final Elk Hills payment. California will receive the final \$15.6 million from the sale of the Elk Hills Naval Petroleum Reserve. The funds go toward the Supplemental Benefit Maintenance Account that protects retirees' purchasing power.

**2013**

- Helped develop CalSTRS funding option through the CalRTA co-sponsored SCR 105.
- Introduced HR 1795 and S 896 to repeal the Social Security Penalties.
- Held a successful Lobby Day in Washington, D.C., visiting all 53 California Representatives and both Senators.
- Achieved more than 120 cosponsors for the Social Security Fairness bills including more than half of California's members of Congress.
- Defeated the CalRTA-opposed SB 24.

**2012**

- Protected current retiree pension benefits from "Pension Reform" reductions.
- Increased post-retirement earnings allowance from approx. \$32,000 to approx. \$40,000.
- Passed CalRTA sponsored SJR 30 (Hancock) urging Congress to repeal the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).
- Passed CalRTA co-sponsored AB 1101 (Eng) to allow election of CalSTRS Board retired member; unfortunately the Governor vetoed the bill.
- Passed CalRTA supported SCR 105 (Negrete McLeod) to start process for improving CalSTRS long-term funding.
- Achieved nearly 200 co-sponsors for federal legislation to repeal the WEP/GPO Social Security penalties.

**2011**

- Held a successful Advocacy Day in Sacramento and Lobby Day in Washington D.C.
- HR 1332 and S 2010 were reintroduced for Social Security Fairness



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

- AB 1862 (Eng) was introduced which would allow for the election of a retired member on the State Teachers' Retirement Board (STRB).
- Protected full state contributions to CalSTRS and purchasing power, even during a \$23 billion state deficit.
- Protected Medicare Part A payments for retirees eligible through 2012 by blocking an attempt to eliminate the payments.

#### **2010**

- Full state contribution to the Teachers' Retirement Fund even when the state had a \$19 billion budget deficit
- CalRTA co-sponsored AB 1862 (Eng) to elect the retiree representative on the Teachers' Retirement Board, passed the Legislature but was vetoed by the governor.
- Conducted a series of pension education meetings in order to prepare for a threatened pension reduction initiative
- Increase Political Action Committee funding to prepare for a potential initiative campaign
- Conducted two WEP/GPO repeal rallies.
- Testified for WEP/GPO repeal before the Commission for Fiscal Responsibility and Reform
- Submitted WEP/GPO repeal written testimony to the House Ways and Means Committee.
- Achieved 330 House of Representatives co-sponsors for WEP/GPO repeal legislation (HR 235 Berman) and 31 United States Senate co-sponsors for repeal (S 484 Feinstein).

#### **2009**

- Supported reintroduction of Senate Bill 810 for health insurance reform.
- Protected the full state contribution to CalSTRS even in a \$40 billion state deficit.
- Re-formed the California Coalition for Social Security Fairness
- Reintroduced HR 235 and S 484 to repeal the Windfall Elimination Provision and Government Pension Offset.
- Held two successful rallies for WEP/GPO repeal and passage of HR 235 and S 484.

#### **2008**

- Increased purchasing power protection via the Supplemental Maintenance Benefit Account (SBMA) to 85 percent from 80 percent.
- Defeated proposals to cap purchasing power protection at less than 85 percent.
- Defeated proposals to restrict CalSTRS investments.
- Achieved 351 co-sponsors for federal legislation to repeal Social Security penalties, the Windfall Elimination Provision (WEP) and Government Pension Offset (GPO).
- Had federal hearings on WEP and GPO and held California press events for WEP and GPO repeal.

#### **2007**

- Successfully litigated for payment of \$500 million owed for purchasing power protection funding.
- Won interest on the \$500 million at 10 percent.
- Reintroduced the Social Security Fairness Act as HR 82 (with more than 320 co-sponsors) and S. 206 (with more than 30 co-sponsors) to repeal the Social Security penalties on California educators.
- Sponsored Assembly Joint Resolution 5 for the California Legislature to urge Congress to pass HR 82 and S. 206.



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

- Supported the enacted SB 901 that continues the earnings limitation exemptions for retired educators returning to school districts in specified situations.
- Defeated the budget proposal to reduce state contributions for purchasing power protection and cap the protection at 80%.

#### **2006**

- Supported the comprehensive universal single- payer health insurance program proposed in SB 840 (Kuehl). This bill passed the Legislature but was vetoed by Governor Schwarzenegger.
- Established a Political Action Committee (PAC) to raise money to fight ballot proposals designed to cut retiree benefits.
- Worked on federal legislation to repeal the WEP and GPO.
- Successfully opposed legislation which would have provided public funding for private school tuition.
- Successfully opposed legislation implementing the Governmental Accounting Standards Board Circular 45 that would have been harmful to retiree health benefits.

#### **2005**

- Successfully opposed the Governor's pension change proposal and joined with other organizations to defeat all legislation regarding changing the retirement system from a guaranteed pension to a risky pension.
- Successfully opposed the Governor's special election ballot propositions that would have reduced CalSTRS funding through having fewer career teachers and reducing future funding for public schools.
- Led a national coalition to repeal the GPO and the WEP through HR 147 authored by Congress man Buck McKeon and S 619 authored by Senator Dianne Feinstein.
- Won our litigation to require the state to make its \$500 million payment plus interest to the Supplemental Benefit Maintenance Account.

#### **2004**

- The seventh Elk Hills Naval Petroleum Reserve appropriation (\$36 million) was secured.
- Congress had special hearings on HR 594 and S 349 to repeal the Windfall Elimination Provision and the Government Pension Offset. We have had more progress on this issue in 2004 than during the prior decade.
- Passage of SB 1137 for the election of the retiree representative on the CalSTRS Board. The bill was subsequently vetoed.
- Governor Schwarzenegger reestablished full funding of the state's contribution for purchasing power protection.

#### **2003**

- 6th Installment payment to the STRS Supplemental Benefit Maintenance Account for the sale of the Elk Hills Naval Petroleum Reserve of \$36 million was assured in the Federal Budget.
- Introduction of HR 594 to repeal the Social Security WEP/GPO penalties. Secured co-sponsorship of more than half of the members of the House of Representatives.
- HR 594's companion bill S 349 was introduced - and informational hearings were held in both the House of Representatives and U.S. Senate.

#### **2002**



California Retired  
Teachers Association

### *Legislative Accomplishments 1982 to 2023*

- Passage of SB 1983 to increase STRS client services, increase the earnings limitation for those subject to the limitation and initiate a study to reform STRS's retirement options.
- Introduction of HR 2638 and S. 1523 to repeal the so-called Windfall Elimination Provision (WEP) and the Government Pension Offset (GPO) Social Security penalties.
- U.S. Senate and House approval of the fifth \$36 million appropriation from the Elk Hills settlement.
- Full funding of the state STRS contributions.

#### **2001**

- Passage of AB 135 (Havice) to increase purchasing power protection from 75% to 80%.

#### **2000**

- Passage of Senate Bill 1435 (Johnston) which allows STRS to pay the cost of Medicare Part A penalties and Medicare Part B penalties for retired teachers who are not eligible for premium free Medicare. The retiree would have to purchase Medicare Part B.
- Passage of Assembly Bill 429 (Correa) which provides an ad hoc retirement allowance increase of between 1% and 6%.
- Passage of Senate Bill 1505 (Burton) which expands eligibility for the SB 713 minimum allowances.
  - Passage of Senate Bill 1692 (Ortiz) to assist pre-1999 retirees to earn the higher 1999 retirement benefits.
  - U.S. Senate and House approval of the third \$36 million appropriation from the Elk Hills settlement.

#### **1999**

- Enactment of Senate Bill 713 (Burton) which increases the minimum STRS allowance for members who retired with 20 or more years of credited service. This benefit increase is valued at \$1.1 billion over the next 30 years.
- Enactment of Senate Bill 159 (Johnston) which is the next step in the development of a STRS offered health insurance program.
- Successful Legislation Day with a comprehensive lobbying effort on SB 159.
- Approval of second \$36 million federal funds appropriation from the Elk Hills settlement.

#### **1998**

- Enactment of SB 2224 for a return to an unmodified allowance for retirees who retired before 1991 and whose option beneficiary has died.
- Enactment of Senate Bill 1528 which allows STRS to study the offering of health insurance.
- AB 2804 which vested purchasing power protection funding.
- Enactment of Assembly Bills 1102, 1150, and 2804 which provides increased retirement allowances for future retirees.
- Federal funding of the first \$36 million from the Elk Hills Settlement Agreement worth \$320 million.

#### **1997**

- Enactment of SB 1026 to provide long-term funding and authorization for purchasing power protection to be increased from 68.2% to 75% of the value of the original allowance.
- Enactment of federal legislation to allow individuals who purchase Parts A and B to have premium free Medicare Part A after 84 months of purchasing Parts A and B.



California Retired  
Teachers Association

*Legislative Accomplishments 1982 to 2023*

- Establishment of the first annual Sacramento Day for a comprehensive lobbying activity in Sacramento.

**1996**

- Enactment of the process to sell the Elk Hills Naval Petroleum Reserve with nine percent of the net sale price reserved for retired teacher benefits through STRS.
- Beginning transfers of State School Lands in the California Desert Protection Act area. The first exchange of 5,000 acres was for \$1 million. The final valuation of exchange should be for between \$40 million and \$70 million.
- Legislative rejection of the Legislative Analyst's recommendation to transfer \$15.6 million from the School Land Bank fund to the State General Fund.

**1995**

- Negotiated agreement with the Department of Energy and the Clinton administration for compensation of the Elk Hills Naval Petroleum Reserve if sold.

**1994**

- Enactment of CRTA sponsored SB 585 which restates the state goal of funding 75 percent purchasing power protection.
- Adoption of CRTA supported fair value exchange language in the California Desert Protection Act. This language concludes a decade long battle to protect retired teacher interests in land which will be acquired by the federal government. The value of the land is between \$40 million to \$70 million.

**1993**

- Enactment of Senate Bill 754 (Hughes) which allows current retirees, whose option beneficiary is still living, to elect Option 6 or Option 7 to return to an unmodified allowance if the beneficiary predeceases the retiree. CRTA Sponsored
- Restoration of the \$50 million in purchasing power funding which was deleted by the Senate in the State budget. CRTA led the Coalition for this restoration.

**1992**

- Passage of Assembly Joint Resolution 86 requesting Congress to establish tax credits for individually purchased health insurance. CRTA Support
- Passage of Proposition 162 which increased the Constitutional protections of the Teachers' Retirement Fund. CRTA Support. Proposal generated by Retired Public Employees.
- Enactment of SB 1884, 1885 and 1886 which provide a new disability retirement program and increase the death benefit from \$2,000 to \$5,000.

**1991**

- Veto of Assembly Bill 191 which would have reduced the funding and contributions to the State Teachers' Retirement Fund. CRTA led opposition to bill.

**1990**

- AB 54 protects retirees who return to work and disabled teachers. CRTA Sponsor



California Retired  
Teachers Association

*Legislative Accomplishments 1982 to 2023*

- AB 4048 which helps address the teacher shortage by allowing retired instructional personnel to earn up to \$15,000 annually through employment by school districts, up from the previous \$8,950 limit. CRTA support as part of Coalition.
- AJR 38 urges the President and Congress to recognize California's right to two school land parcels within the Elk Hills Petroleum Reserve. CRTA Sponsor
- SB 1370 raises employer and employee contributions to the retirement system to 4.3% total to cover the normal cost and unfunded liability. Full funding, after forty (40) years for the Teachers Retirement Fund. CRTA Sponsor
- AB 373 establishes a program for statewide catastrophic health insurance. CRTA Support
- AJR 71 urges Congress to establish a process allowing STRS retirees to purchase any quarters they need to qualify for Medicare Part A. CRTA Sponsor

**1989**

- AB 50 protects the federal tax deductibility of the State Teachers' Retirement System under new changes to the Internal Revenue Code Section 415. CRTA Support
- AB 265 allows teachers to bargain to secure individual teachers the right to join the federal Medicare system. CRTA Support, CTA Sponsor
- SB 1513 and SB 1407 will guarantee funding for 68.2% purchasing power. CRTA Sponsor
- SB 682 provided two new options to return to unmodified allowance if beneficiary predeceases the member. Signed in 1990. CRTA Sponsor

**1988**

- Promoted statewide health benefits for all retirees. CRTA Support
- AB 59 guarantees that state school land revenues from Elk Hills will be used for teacher retirement benefits. CRTA Sponsor
- SB 2682 limited the amount of overpayments that could be collected from a retiree. CRTA Sponsor
- AB 3172 ensures warrant stub and deposit information is sent to members using direct deposit. CRTA Sponsor

**1987**

- Funding received from the Governor to increase retiree and benefits to 68.2% toward a goal of 75% of original 1986 purchasing power. CRTA and ART led Coalition.
- AB 58 allows the Public Employees' Retirement System to develop a health benefits plan for teacher organizations. CRTA Sponsor

**1986**

- Increased purchasing power funding to over \$100 million. CRTA and ART led Coalition.
- Increased post-retirement teaching earnings to \$7,500.

**1985**

- AB 528 permitted retirees to enroll in school district health and dental plans. AB 528 made it easier for schools to join the Public Employees' Retirement System administered health insurance program. CRTA Sponsor



California Retired  
Teachers Association

*Legislative Accomplishments 1982 to 2023*

**1984**

- Appointment of CRTA member to STRS Board.

**1983**

- SB 628 raised benefits further for 60,000 by relatively small amounts toward a goal of 75% of original purchasing power. Payments quarterly, beginning 1984. CRTA led Coalition.
- Budget Augmentation: \$20.5 million added by legislature and Governor to correct Governor's omission of amount required by SB 1562. Sufficient to raise benefits for 35,654 to 58.4% of original purchasing power. Payments quarterly beginning October 1983. CRTA led Coalition.
- AB 743 requires appointment of a retired teacher to the STRS Board. CRTA Support

**1982**

- SB 1562 requires Governor to include in annual budget a sum for increasing retiree benefits. CRTA Sponsor