



# COPRA CHRONICLE

Issued by and for the City of Phoenix Retirees Association  
*Your advocate in pension and insurance matters*

November 2011 **MEMBERSHIP IS OUR STRENGTH** Issue 4

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## COPRA BOARD ELECTIONS AND CANDIDATE BIOGRAPHIES

It is election time once again for the COPRA Board of Directors. In the October issue of the Chronicle, we put out a call for volunteers that would be willing to serve on the Board. Three people stepped forward to answer this call. Their biographies along with the two incumbent officers are included in this article.

There are ten elected positions on the Board, each serving a two year term. Elections are staggered with five Board positions coming up for election each year. There are five members seeking election this year for the term of office 2012 – 2013.

In accordance with the COPRA By-laws, if there are no more than five candidates seeking office, a formalized ballot process is not required. Voting will be conducted by a "voice vote" at the December 1st COPRA Annual Meeting and Holiday Party.

A special thanks to all who participated in the process: **Dawnell Navarro, Nominating Committee Chair; Karen Clifford-Anderson, Laura Ross, Sue Stites and Yvonne Warren.**



### CANDIDATE BIOGRAPHIES

#### **BARBARA KELLOGG (incumbent)**

Barbara retired from Water Services in 2005 as a Management Services Administrator after 23 years with the City. She has been with COPRA since retiring and is currently serving on the board as Treasurer. "COPRA's advocacy on behalf of retirees is important to our current and future quality of life."

#### **JACK THOMAS (incumbent)**

Jack retired from Information Technology in 1998 as a Deputy Director after 32 years with the City. Subsequent to his retirement, he has been an active member of COPRA. He is currently serving as Board President and has also previously served as Vice President. Additionally, he previously served on the board of directors of Arizona Federal Credit Union. "I have a strong commitment to championing the interests of retirees."

*(Continued on page 3)*

**MEMBERSHIP**

Changed your address or phone number? For address and/or telephone number changes, or for any questions about your COPRA membership, please contact Marvin Roelse, Membership Chairman. Marvin can be reached by telephone at (480) 288-1046, or by mail at: COPRA Chronicle, 10701 E. Peralta Canyon Dr., Gold Canyon, AZ 85118, or by e-mail at [marvinr567@msn.com](mailto:marvinr567@msn.com)

# PRESIDENT'S MESSAGE



The month of October was very busy for COPRA. We had an excellent turnout at our annual State of the City Meeting with City Manager David Cavazos. Everyone who attended received an excellent update on the Pension Reform Task Force activities from Rick Naimark, Deputy City Manager. I thank both of these individuals for taking the time out of their busy schedules to share their thoughts with COPRA. David, as most of you know also writes an article for our Chronicle newsletters that is greatly appreciated.

We will be holding the election of COPRA directors in December so please take note in this issue of the Chronicle on the candidates up for election. Unfortunately December will also be the last month for Ray Bladine to serve as our representative to the COPERS Board. Ray has done an outstanding job for retirees and we thank him for his service. I am pleased to announce that the COPRA Board has recommended Cathy Gleason to serve as our representative on COPERS going forward and we know that she will also do an outstanding job for retirees. Cathy is running for the COPRA Board as well.

I am again dedicating most of this article to updating you on the Pension Reform Task Force. The committee met twice since our last publication, most recently on Wednesday, October 26<sup>th</sup>. The turnout of employees and retirees was significant for the meeting held in the City Council Chambers. The following thirteen recommendations have been agreed to by a majority of the Task Force so far. Eleven of these are focused on new employees only and two others impact some existing employees. Additional recommendations are still under review and will be discussed at the next meeting of the Task Force.

**NOTE:** The proposed effective date for any suggestions or proposals is July 1, 2012 or whatever date is legally appropriate.

***The Committee voted to recommend that the City Council approve the following items for NEW EMPLOYEES ONLY.***

1. Retirement Plan Contributions: Increase employee contribution rate from the current 5% of salary to 9%.
2. Vacation and Sick Pay: Vacation and sick pay cannot be utilized to boost pension calculations.
3. Retirement Age: The retirement age will be raised from 60 to 63 years of age with ten years service. Retirement at 62 years of age with 5 years' service is eliminated.
4. The Rule of 80 is changed to the Rule of 83.
5. The Final Average Compensation for Pension calculations will exclude travel, communications or technical allowances.
6. The 13<sup>th</sup> Check provision is repealed. The PEP provision remains in force.
7. Time of Service calculations shall reflect actual service time with 20 days of service required before a month is credited and 240 days of service required before a year of service is credited.
8. The smoothing time period remains at four years.
9. Multiplier: Change the current pension pay multiplier from current levels to a graduated multiplier based on years of service. These are incremental multipliers applying to the various periods of time worked.
  - i. Up to 10 years service: 1.85
  - ii. Upon 15 years service: 1.9
  - iii. Upon 20 years service: 1.95
  - iv. Upon 25 years service: 2.0
  - v. Upon 30 years service: 2.1
10. Change the three year salary average for pension calculation to a five year salary average.
11. Minimum Pension: Terminate any existing minimum pension fund requirements.

***The Committee voted to recommend that the City Council approve the following items for EXISTING EMPLOYEES*** who are under age 50 with less than 15 years service or with less than 70 points toward the Rule of 80 on the effective date of these provisions.

1. Pension Calculator: Change the Final Average Compensation for pension calculations to exclude travel, communications or technical allowances. *Allowances earned prior to the effective date of these proposals will still be utilized in pension calculations.*

*(Continued on page 3)*

## PRESIDENT'S MESSAGE (CONTINUED)

*(Continued from page 2)*

2. Time of Service: Change the determination of time of service to reflect actual service time so that a month of service includes 20 days of service before a month of service is credited. A year of service includes 240 days of service before a year of service is credited. *As stated above, credits received prior to the effective date of these proposals will still be utilized in pension calculations.*

The Task Force will be taking up discussions and possible voting on some additional recommendations for consideration at the next scheduled meeting. These include the following that would **impact existing City employees only**:

1. Recommend increasing the employee contribution rate from the current 5% of salary to 9% over an eight year period. It would graduate from 5.5% in 2012 and ending up at 9% going forward in 2018.
2. Recommend that vacation and sick pay cannot be utilized to boost pension calculations. Accumulated vacation and sick hours prior to July 1, 2012 will still be utilized in pension calculations.
3. Recommend changing the three year salary average for pension calculations to a five year salary average.
4. Recommend repealing the 13<sup>th</sup> check provision and allowing PEP provision to remain in force.

Again, the above four recommendations are still up for discussion and no decisions have been made at this point. Additional ideas and suggestions may also be brought to the Task Force and as always there is an opportunity for interested individuals to speak to the committee during the public input phase of the meeting.

As you can see, the Task Force is moving forward with recommendations and not without concerns expressed by some members on various issues. You are encouraged to attend the upcoming meetings of the Task Force and to also share your thoughts if you would like. Receiving input from City employees, retirees and citizens is always helpful in better understanding the issues and impacts on individuals. The next meeting is currently scheduled for November 17<sup>th</sup> at 4 PM. The location has not yet been determined but an expected large turnout is anticipated. Please check the City website for location or contact the City prior to the 17<sup>th</sup> if needed. We will also try to put it on our website.

I hope all of you have a wonderful Thanksgiving and also I encourage you to join us for the Annual Holiday Dinner coming up in December. Please look at your calendar and try to make this event which will also include the annual meeting.

See you there.....Jack

## CANDIDATE BIOGRAPHIES (CONTINUED)

*(Continued from page 1)*

### **CATHLEEN GLEASON**

Cathleen has a Bachelor's degree in Business and a Master's degree in Public Administration. She started with the Fire Department in 1982 as a 9-1-1 dispatcher and through hard work and continuing education eventually worked her way up to Budget Director. She retired in January 2011 after almost 29 years of service. Cathleen was a member of the City of Phoenix Employee's Retirement System (COPERS) Board for 14 years, six of those years as the Chairman. Cathleen will be a dedicated and thoughtful member of the COPRA Board.

### **SHERYL JEREMIAH**

Sheryl began her career in the Engineering Department as a Secretary II in 1980. During the ensuing years, she worked for the Street Transportation, City Auditor, Water Services, Budget and Research, Office of Emergency Management, and Library departments. Sheryl retired from the Water Services Department in 2008 as a Budget Analyst II. After retiring from the City of Phoenix, she worked for the City of Peoria as a Management Analyst. Since leaving the City of Peoria in 2010, she has volunteered for the Administrative, Supervisory, Professional and Technical Employees Association (ASPTA), where she performs research on pension and other benefit issues and monitors pending state legislation that has the potential to affect City employees and retirees. Sheryl holds a Bachelor of Science degree in Accountancy and is a Certified Public Accountant and a Certified Government Financial Manager.

*(Continued on page 4)*



# HOLIDAY PARTY

## COPRA'S Annual Holiday Party and Annual Meeting Thursday, December 1, 2011

at  
The Mountain Preserve Reception Center,  
1431 East Dunlap, Phoenix, AZ  
Doors open at 11:30 a.m.

Cost is \$18.00 per person (additional costs subsidized by COPRA).

Tickets must be purchased in advance no later than  
Saturday, November 19, 2011.

No tickets will be sold at the door on the day of the event.

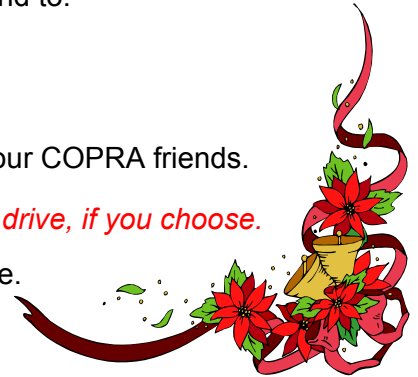
Please make checks payable to COPRA and send to:

Barbara Kellogg  
1465 E Rosemonte Dr  
Phoenix, AZ 85024-2962

Please join us for a lovely meal and good conversation with your COPRA friends.

*You can bring an unwrapped new toy for delivery to a local toy drive, if you choose.*

Limited handicapped parking will be available.



## CANDIDATE BIOGRAPHIES (CONTINUED)

*(Continued from page 4)*

### **ROBERT SALEMI**

Robert retired in 2010 after 28 years of service with the City of Phoenix. Over the last 25 years, he acted in the capacity of human resources professional within the Parks, Recreation and Library, Personnel, and Fire departments. In addition to his regular job responsibilities, other activities included assisting in the creation and implementation of the Disability Assessment Committee; management of the Rehabilitation Services Program; assisting with the development of the Managing Your Career Program; and serving as staff support to the Phoenix Public Safety Retirement System Pension Board. "As a retiree, it is my desire to help maintain the open communication between the City of Phoenix and COPRA."

### **NEARLY TIME TO RENEW YOUR COPRA MEMBERSHIP DUES FOR 2012**

Please check the mailing label on this Chronicle for the "Dues Paid Thru:" year. If the "Dues Paid Thru:" year is "2011", you need to renew your COPRA membership!

If you receive the COPRA Chronicle by email which doesn't have a mailing label, you will receive an email in December advising you of the status of your COPRA membership.

As a retiree, it is important that you stay abreast of events happening in the City that may have an impact on your benefits and the retirement fund. Please renew your membership today. As our motto on the front page of the Chronicle says, "Membership is Our Strength."

COPRA membership dues are \$10.00 for all members. The dues special is still available so if you pay dues for 4 years (\$40.00), you get credit for 5 years. To renew your COPRA membership, send a check payable to "COPRA" to the following address:

COPRA  
% Marvin Roelse  
10701 East Peralta Canyon Drive  
Gold Canyon, AZ 85118-5130



# CITY MANAGER'S CORNER

Phoenix residents are very excited about the city's plan to begin collecting trash and recycling on the same day. Little do they know, my widowed mother had a hand in this service improvement that goes into effect July 1, 2012.

A few months ago, I visited my mom in McAllen, Texas, which is located on the southern tip of the state in the Rio Grande Valley. While I was there, I visited my friend, McAllen City Manager Mike Perez. We were "talking shop" when Mike mentioned that McAllen had same-day collection of trash and recycling.

That conversation was the impetus for same-day service here, and I jokingly tell folks that mom deserves some of the credit due to my visit. In reality, Phoenix has been headed in that direction for some time, and Mike's feedback was certainly helpful.



Collecting trash and recycling on the same day will make it easier for customers because they will only have to remember to wheel the collection containers to the curb on one day, instead of two. The new process will eliminate the need for 12 trucks and 12 employees, saving more than \$6 million over five years. Of course, we'll make every effort to achieve the employee savings through attrition.

Same-day collection is another example of the city making changes to our current processes to become as efficient as possible and to save every dollar we can.

Speaking of trash and recycling, the November/December issue of "Notes" soon will be landing in your mailbox with your municipal-services bill. The newsletter is packed with useful information about trash and recycling, including 2012 pickup schedules, bulk trash, recycling holiday material, Christmas tree drop-off sites, and more.

You may want to keep it in a kitchen drawer for future reference or you can find the publication online at <http://phoenix.gov/citygovernment/mediacenter/newsletters/index.html>. Click on the link that says "Read the Notes Newsletter Online."

A few months ago, I introduced you to the Phoenix Strategic Plan. The priorities outlined in this comprehensive plan will guide us as we make decisions about allocating or reallocating the city's limited resources. The plan's 10 focus areas are:

- Economic Development and Education
- Financial Excellence
- Infrastructure
- Innovation and Efficiency
- Neighborhoods and Livability
- Phoenix Team
- Public Safety
- Social Services Delivery
- Sustainability
- Technology

To measure the city's performance in these areas, I've asked staff to develop a "performance dashboard," which is basically a visual display of key performance indicators.

As you know, an automobile dashboard provides you all the information you need at a glance to operate your vehicle safely and efficiently. The same can be said of a performance dashboard, except the "vehicle" is actually the city of Phoenix.

The dashboard's key performance indicators have been reviewed and approved by the Innovation and Efficiency Task Force, which includes city representatives and members of the business community.

I won't go over all the key performance indicators for the strategic plan's 10 focus areas, but I know you'll be interested in "Neighborhoods and Livability" and "Public Safety."

*(Continued on page 6)*

## DO YOU HAVE MEDICARE QUESTIONS?

The Medicare annual enrollment this year runs October 15 through December 7. The COPRA Health & Benefits Committee, in conjunction with the City of Phoenix Human Resources Department, has arranged with the Area Agency on Aging to provide some informational sessions on Medicare for COPRA members. These sessions (see schedule below) will provide information on Medicare options for those currently eligible as well as for those approaching eligibility that want to be prepared to make decisions on what to do when they reach eligibility.

### Medicare Informational Sessions

**November 9, 2011 at  
9:30-11:30 a.m.**  
Washington Activity Center  
2240 W. Citrus Way  
Phoenix, AZ 85015  
602-262-6971

**November 17, 2011 at  
9:30-11:30 a.m.**  
South Mountain Senior Center  
212 E. Alta Vista Rd.  
Phoenix, AZ 85040  
602-262-4093

In the meantime, if you would like to learn more about Medicare and the options available to you, the Area Agency on the Aging offers Stairway to Medicare, an easy, interactive, free online informational tool. You create your own login and learn at your own pace, starting and stopping the training steps as it suits your needs. Visit [www.stairwaytomedicare.org](http://www.stairwaytomedicare.org) and get started today!

Also available for information and help is the Area Agency on Aging 24-hour Help Line at 602-264-4357(HELP). You can also visit any of the City of Phoenix Senior Center sites where you can make an appointment to see an Area Agency on Aging volunteer to look at your situation and learn more about your Medicare options. Check out the Area Agency on Aging web site at [www.aaaphx.org](http://www.aaaphx.org) for other good information.

## COPRA FINANCIAL RECORDS AUDITED

The COPRA Board elected a new Treasurer this year upon Gary Gross' retirement from the Board. Barbara Kellogg took over the Treasurer responsibilities in January. A change in Treasurer requires an audit of the financial records. Betty Wald, retired Assistant City Auditor, volunteered her time and expertise to conduct the audit. After a review of the records, Betty's conclusion was: The Treasurer's Report as of December 30, 2010 is accurate as presented. A more frequent audit (every three to four years) may better preserve integrity of records. The recommendation to conduct more frequent audits was prompted by the difficulty of reading some of the receipts, which had faded over time.

The detailed audit is available to any COPRA Member who wants to review it by contacting Barbara Kellogg.

COPRA thanks Betty Wald for her time and effort conducting this audit, and Gary Gross for his skilled management of the association's finances for many years.

## CITY MANAGER'S CORNER (CONTINUED)

*(Continued from page 5)*

For Neighborhoods and Livability, key performance indicators include code enforcement case-cycle time (percent resolved within 53 days or less) and graffiti sites removed (target: 80,000 sites).

The key performance indicators for public safety are crime rate per 100,000 persons; average Fire Department First Unit Response Time (% within five minutes of dispatch); and Municipal Court caseload clearance rate (100%).

There is also a key performance indicator for customer service: Response time to customer calls (80% within three minutes or less).

As always, if you have questions about any city issue, please feel free to send me an email at [david.cavazos@phoenix.gov](mailto:david.cavazos@phoenix.gov) or call me at 602-262-7958.

Before signing off, I'd like to wish all of you a safe and happy Thanksgiving holiday.

## *In Remembrance*

James C Henley	09/20/11
Helen Spreitzer	09/28/11 Survivor
Robert Balcomb	10/03/11
Daniel Villaverde	10/05/11
Esther Loveless	10/05/11 Survivor
Edward Sargent	10/05/11
Patricia Kern	10/08/11
Charles Raymond	10/10/11
Dorothy Lakin	10/11/11
Dorothy Kunstmann	10/11/11
Elizabeth Ritter	10/12/11
Helen Cavaness	10/12/11 Survivor
Donna Elliott	10/14/11

### HEALTH AND COMPASSION

We care about our members and their families. If someone in your family is ill, whether at home or in a care facility, or if a loved one has passed away, please call Mary Dysinger-Franklin at (602) 705-8822

## NEW RETIREES

### August 2011

Kathlyne Anderson  
 Elizabeth Guffy  
 Kelvin Hawes  
 Raymond Jack  
 David Michael  
 Elizabeth Moffat  
 Dennis Naiberg  
 Mike Nevarez  
 Sam Pignato  
 John Todd

## 2012 SOCIAL SECURITY COLA

For the first time in two years, seniors will get a cost-of-living adjustment (COLA) starting in January. But whether they see a boost in their bank statements is another matter. The Social Security Administration recently announced the COLA will increase benefits by 3.6%. But rising Medicare Part B, drug plan and health plan premiums are expected to offset some of the COLA for most beneficiaries.

## 2011 COPRA BOARD

President:	<b>Jack Thomas</b>	(623) 825-6999
	E-Mail	<a href="mailto:jtnt@cox.net">jtnt@cox.net</a>
Vice President:	<b>Laura Ross</b>	(623) 878-3334
	E-mail	<a href="mailto:lross50@gmail.com">lross50@gmail.com</a>
Treasurer:	<b>Barbara Kellogg</b>	(623) 322-5227
	E-mail	<a href="mailto:avidgolfer@aol.com">avidgolfer@aol.com</a>
Secretary:	<b>Dawnell Navarro</b>	(623) 412-0854
	E-mail	<a href="mailto:navarro2@cox.net">navarro2@cox.net</a>
Board Members:	<b>Marvin Roelse</b>	(480) 288-1046
	E-mail	<a href="mailto:marvinr567@msn.com">marvinr567@msn.com</a>
	<b>Ray Bladine</b>	602-944-0971
	E-mail	<a href="mailto:rbladine@cox.net">rbladine@cox.net</a>
	<b>Vacant</b>	
	<b>Sue Stites</b>	(602) 819-7106
	E-mail	<a href="mailto:sstites@cox.net">sstites@cox.net</a>
	<b>Karen Clifford-Anderson</b>	(623) 772-7472
	E-mail	<a href="mailto:kcliffander@yahoo.com">kcliffander@yahoo.com</a>
	<b>Yvonne Warren</b>	(602)952-1025
	E-mail	<a href="mailto:yimmons@yahoo.com">yimmons@yahoo.com</a>
Benefits Committee Chair & Health Task Force:	<b>Laura Ross</b>	(623) 878-3334
	E-mail	<a href="mailto:lross50@gmail.com">lross50@gmail.com</a>
Retirement Board Rep:	<b>Ray Bladine</b>	602-944-0971
	E-mail	<a href="mailto:rbladine@cox.net">rbladine@cox.net</a>
Member Support and Social Chair:	<b>Vacant</b>	
Membership Chair:	<b>Marvin Roelse</b>	(480) 288-1046
	E-mail	<a href="mailto:marvinr567@msn.com">marvinr567@msn.com</a>
Chronicle Editor:	<b>Mary Dysinger-Franklin</b>	(602) 705-8822
	E-mail	<a href="mailto:copranewsletter@gmail.com">copranewsletter@gmail.com</a>
Past President:	<b>John Burke</b> (ex officio)	(928) 427-9461

COPRA website.....	www.phoenixcopra.com
COPERS website.....	www.phoenix.gov/phxcopers
COPMEA website.....	www.copmea.com
City Retirement Systems (COPERS).....	(602) 534-4400
Personnel - Benefits Section .....	(602) 262-4777
COPMEA.....	(602) 262-6857

### Chronicle Article Deadline

Please be advised that the deadline for submitting articles for the Chronicle is the **20th day of the month** before you want the article to appear. Any member may submit material for publication, but the Editor determines what will appear in the final copy based on suitability and available space.

This is your Chronicle. Help us by submitting articles of general interest. Tell us about yourself, your family, a trip you've taken or an interesting hobby you have. Suggestions are always welcomed.

E-mail to: [COPRAnewsletter@gmail.com](mailto:COPRAnewsletter@gmail.com)  
 Or mail to: Mary Dysinger-Franklin  
 6208 E. Desert Cove Ave  
 Scottsdale, AZ 85254

### Disclaimer

Acceptance of advertisements or articles in the COPRA Chronicle does not constitute an endorsement by COPRA of goods or services.



## NOVEMBER COPRA CHRONICLE

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Please send address corrections to:  
COPRA Chronicle, %Marvin Roelse  
10701 East Peralta Canyon Dr.  
Gold Canyon, AZ 85118



# HAPPY THANKSGIVING!

### MEMBERSHIP MEETING ANNOUNCEMENTS

*Don't forget to purchase  
your Holiday Party Tickets*

**December 1, 2011- Holiday Party (11:30 am) and Annual Meeting**

Phoenix Mountain Preserve Center

1431 E Dunlap

Phoenix, AZ 85020

**Board meetings are at 10 am on the 2nd Thursday of the Month  
Except for June, July and August**