



ACSA Council of Retired Leaders Minutes of the Meeting

**September 3, 2025; 10 am – 2 pm**

**ACSA Office Sacramento, 3<sup>rd</sup> Floor Conference Room**

**I. Roll Call & Introductions/Ice Breaker**

	Name	Region	Attendance
3	Marc Winger	Council President (R15)	Present
1	Jan Schmidt	Region 1	Absent
2	Kathleen McCreary	Region 2	Present
3	Mary Cardoso	Region 3	Present
4	Lilibeth Pinpin	Region 4	Present
4	June Regis	Region 4	Present
5	Jennie Horn	Region 5	Present
6	David Thornley	Region 6	Present
7	Donald Davis	Region 7	Present
8	Clifford Tyler	Region 8	Present
9	Kathleen Lopes	Region 9	Present
10	Robert Mayeda	Region 10	Present
11	Craig	Region 11	Present
12	Jim (for Mary Kay de Cresenzo)	Region 12	Present
13	David Gomez	Region 13	Present
14	Jim Jones	Region 14	Present
15	Cyndi Parulan Colfer	Region 15	Present

16	Carrie Schwartz	Region 16	Present
17	Bob Silva	Region 17	Present
18	Sandra Clifton	Region 18	Present
19	Steven Hovey	Region 19	Absent
11	Blanca Cavasos	Board Liaison	Absent
0	Dorothy Johnson	Subject Matter Expert	Present
15	Alice Petrossian	Staff Liaison	Present
0	Stephanie Bernardo	Support Staff	Present
0	Joycelyn Martinez-Wade	STRS Liaison	Absent
0	Diane Stanton	STRS Liaison	Absent
0	Susan Forrer	PERS Liaison	Absent
3	Sam Neustadt	CalSTRS Retiree Rep	Absent
	Shelton Yip	ACSA Region 3 and 4 Ambassador	Present
16	Michael Payne	Board Liaison	Present
	Kathleen McCreery	Board Liaison	Present

During the meeting opening, the new council president, **Marc Winger**, outlined the purpose of the meeting, introduced key staff, and established a procedural rule for speakers.

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### **Ice Breaker: Why Retirees Stay Involved**

Several members shared their reasons for remaining with the organization after retirement. Their motivations ranged from a sense of duty to a desire for continued connection and advocacy.

- **Rob Maeda (Region 10):** Feels he'd be hard to replace in his small charter and wants to make a difference in retirement.

- **June Regis (Region 4):** Her membership was a "life-giving source" during her career, and she wants to continue that connection.
- **Cindy Pullen-Colfer (Region 14/15):** Joined at the urging of a close friend and colleague.
- **David Gomez (Region 13):** Believes in "giving back" after a successful career in education.
- **Lilibeth Pinpin (Region 4; Council Secretary):** Wants to maintain her connection and still has the energy to help and collaborate with others.
- **Kathleen Lopes (Region 9; Council Treasurer):** A long-time member and former chair, she decided to return as a representative because she enjoys the activity.
- **Don Davis (Region 7):** A retired superintendent who "can't imagine leaving the work," particularly his advocacy for addressing the underperformance of boys.
- **Mary Curtis (Region 3):** A new retiree who wants to continue making connections and helping others in a new way, as she loves schools but was ready for a different kind of work.
- **Jenny Horne (Region 5):** Joined after retiring and continues her involvement because the "fight continues," specifically referencing the work done to repeal the **WEP/GPO laws**.
- **Jim Dilday (Region 12, Subbing for Mary Kay DeCrescenzo):** In his 15th year of retirement, he attributes his continued involvement to the concept of **servant leadership** and feels his work is a "gift," not a job.
- **Craig Wheaton (Region 11):** Was drawn back to the organization after a couple of years away. He values the mentors he found through ACSA and wanted to "re-engage" and contribute.
- **Bob Silva (Region 17):** Believes it's important for retirees to be represented and to advocate for the "youngsters that are up and coming," serving as mentors and a support system.
- **Shelton Yip (Past President):** Started as a student member and has never left. He was encouraged to join by a superintendent early in his career and continues to serve as a school board member.

- **David Thornley (Region 6):** Apologized for being late due to a train delay. He was influenced by his father, who was a charter member of ACSA, and a past president who convinced him to join. He also emphasizes the value of a pension.
- **Michael Payne (Region 16):** As a board of directors liaison, he just retired but remains involved to support ACSA and his region's retiree efforts.
- **Dorothy Johnson (ACSA Legislative Advocate):** Works on legislative issues for ACSA and serves as staff support.
- **Mary Schwartz (Region 16):** In her third and final year on the council, she enjoys being part of both the council and her regional board.
- **Alice Petrosian (Board Liaison):** After serving as State President, she chose to become the board liaison for the retirement committee because she knew she would be retiring soon.
- **Sandy Clifton (Council Vice-President):** Was drawn to ACSA through her passion for legislation. A key moment was working with a difficult CTA representative and learning the "power" of building relationships and finding common ground. She feels her involvement gives her a sense of still having a career.
- **Kathy McCreary (Region 2):** Describes ACSA as a "big family" and praises the council for its work on the WEP/GPO issue, noting that there is still important work to be done.
- **Cliff Tyler (Region 8):** Couldn't attend in person but has been involved since the mid-1970s and enjoys being part of the group.
- **Jim Jones (Region 14):** Retired in 2019 and joined the council in 2020 or 2021. He noted that constituents in his region are very happy about the WEP/GPO repeal, which was a result of the group's advocacy.
- **Marc Winger (President):** A member for over 30 years and a former superintendent, he explained that his primary motivation for continued involvement is that the organization serves as a voice for its members.

## II. Key Points from Edgar Zazueta's and Margie Cuizon-Armelino's Presentations

**Edgar Zazueta**, ACSA's Executive Director, began his address by congratulating Mark Winger on his new post and sharing his appreciation for the attendees' "why" for staying involved. He highlighted the importance of listening to members and acknowledged that the organization is more than just its logo; it's the **communities** built by its members. He

praised the council's persistence, particularly in the successful repeal of the **WEP/GPO law**, noting that such a victory was considered unlikely years ago. He concluded by inviting the council to provide continued feedback and discuss new opportunities, referencing the "Keeping the Spirit Alive" document as a starting point for future initiatives.

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**Margarita Cuizon-Armelino**, ACSA's Deputy Executive Director, presented data highlighting that ACSA's current membership is 16,424, with retired members making up the second-largest group at about 15% of the total. The organization has identified nearly 5,000 members aged 55 or older, with over 3,000 of them still active administrators who are ideal candidates for the retirement council. The most promising regions for recruiting these potential retirees are Regions 15, 16, 6, 19, and 12, due to their high concentration of members aged 55 and older. To attract these individuals, it was suggested that the council work with regional recruiters and ambassadors, form a marketing subcommittee to create appealing materials, and emphasize the value of emeritus status.

### **III. Key Points from the Council Discussion**

- **Consultants' Role:** The council recognizes that **consultants** are crucial for recruitment, especially because they have direct access to potential members through their professional networks.
- **Recruitment Strategy:** The council seeks to collaborate with the ACSA marketing team to develop targeted materials for recruiting new members. They plan to use the data presented earlier to focus on regions with a high number of administrators over 55.
- **"Keeping the Spirit Alive":** The council's president, Mark, mentioned that a key goal is to revisit the "Keeping the Spirit Alive" document to ensure continued involvement of retirees in ACSA's committees. He plans to form a subcommittee to address the points that were not accomplished last year.
- **Survey:** A survey for members over 55, developed last year, is ready to be sent out. The council believes the survey will provide valuable insights into the needs and sentiments of this demographic.
- **Budget Overview:**
  - The council has a budget of **\$7,900**.
  - **\$2,400** is allocated for meeting facilities and food.
  - **\$500** is for awards.

- **\$5,000** is for travel expenses.
- Last year's expenses totaled **\$6,060**, mostly for travel.
- **Travel Reimbursement and Policy:** There was a discussion about the lack of clarity regarding the travel reimbursement policy, particularly for lodging. While it was stated that lodging is typically not covered, exceptions can be made for those traveling long distances, with prior approval from **Stephanie** or **Dorothy**. The council is seeking a formal, written policy to clarify these rules.

Council members discussed several key topics including meeting schedules, conference registration, publication opportunities, and committee appointments.

#### **IV. Key Discussion Points of Meeting and Conference Information**

- The council will **not have in-person meetings until May**. They will no longer host meetings at the Leadership Summit, meaning members must attend the summit on their own.
- **Emeritus members** can register for the Leadership Summit for free by using the discount code **EMERITUS25**.
- Several members experienced issues with the registration system, where it either charged them or did not provide a discount field. The council is working with staff members Stephanie and Dorothy to resolve this.

#### **V. Publications and Outreach**

- The council is planning to publish articles in the **EdCal** publication.
- They have a goal of publishing **2 to 3 articles per year**, with a word count between 300 and 1,000 words.
- The first article will use data from **Margie** to highlight the value of membership to administrators over 55 and promote an upcoming survey.

#### **VI. Committee and Liaison Opportunities**

- The council must review its **bylaws** annually. The current bylaws were created last year and outline the roles of officers, representatives, and the nature of meetings.
- **Liaison opportunities** were discussed for various committees and organizations. The council prefers that a member of the council serve on these committees.

- **CalSTRS Advisory Committee:** Two members, Shelton and Dorothy, already attend. The council is seeking a third member from the council to join. It was noted that this committee is all on Zoom.
- **CalPERS Advisory Committee:** The council is seeking a member to attend this remote committee meeting, as it's important for classified personnel and impacts members' insurance. A member noted their insurance is increasing by 13% next year.
- **Coalition of Retired Educators:** The council is looking for a member to attend these in-person meetings, which occur in Sacramento about three times a year. These meetings are crucial for building relationships with other retired educators' associations. Lilibeth has volunteered to attend.
- **National Retirement Security Task Force:** This online task force, which focuses on social security, is seeking a voice from the council. It meets typically once a month, but sometimes more frequently, for about 90 minutes. Two members, Shelton and Gary, have volunteered to join.

## **VII. "Keeping the Spirit Alive" Document Discussion**

This document serves as a guide for the council's ongoing work. The back pages, marked in red, highlight areas that still need to be addressed. The plan is to tackle these issues through subcommittees to make progress more efficiently.

### **Key Initiatives and Strategies**

- **Board Representation:** The council is concerned that their representation on the board is not guaranteed. While a board liaison is currently in place, this position is appointed by the president, not a permanent part of the board structure. The council seeks a way to ensure a dedicated board seat for a retiree to provide a consistent voice and institutional memory.
- **Mentor Program:** The council wants to explore a formal mentor program utilizing retired members to help active administrators. A key question is whether this program would be free for both mentors and mentees. A staff member is tasked with getting specific information from the person in charge of the program to determine how the council can support it.
- **Interim Positions:** The council identified a need to explore how retired members can serve in interim midlevel administrator positions but noted no clear action on this from the organization.

- **Broader Involvement:** The council aims to expand retiree involvement in various committees and regional activities to increase their profile and engagement across the organization.

## **VIII. New Motto and Subcommittee Formation**

Based on the discussion, the group has decided on a new motto for the council, formed two subcommittees, and planned their first meetings.

### **New Motto**

The group's final choice for the motto combines elements from several ideas presented. The selected motto is:

**Experience, leadership, and advocacy for California schools, serving ACSA retirees and leaders.**

### **Subcommittee Formation**

Two subcommittees were formed to address key initiatives. The goal is for these groups to meet and prepare for a report to the full council before the November meeting.

- **Subcommittee A (Policy/Status):** This group will meet with the organization's management to discuss the status of the "Keeping the Spirit Alive" document. This subcommittee will focus on getting concrete answers and technical details, such as securing a dedicated board seat for a retiree. The members are: Cyndi Colfer, David Thornley, Craig Wheaton, Bob Silva, Donald Davis, Clifford Tyler, Sandy Clifton and Shelton Yip.
- **Subcommittee B (Marketing):** This group will meet with staff to develop a marketing plan. Their goal is to create a "marketing package" for regional leaders with a clear message about the retirees' council. The members are Jennie Horn, Mary Cardoso, Mary Kay DeCrescenzo, Michael Payne, Carrie Schwartz, Kathleen Lopes, Kathleen McCreery, June Regis, Robert Mayeda and Shelton Yip.

### **Next Steps and Meeting Logistics**

- The council will use a **Doodle poll** to find a suitable date and time for the subcommittees to meet.
- The Doodle poll will be sent out sometime in **October**, likely in the late afternoon.
- The aim is for each subcommittee to have at least one meeting before the full council meeting in **November**.

## **IX. Key Discussions from the Regional Reports**

The key takeaways from the region reports focused on a mix of strategies for engaging retirees and challenges that could impact membership. Regions are using methods like hosting receptions for new members and distributing newsletters to keep retirees involved. However, they face challenges such as large geographical areas, making it hard to find a central meeting place, and a lack of communication that often excludes retirees from general region-wide emails.

It was emphasized that retirees should be included in all regional activities, not just retiree-specific events, as this helps them feel a continued sense of connection. Some regions offer financial support, such as grants or scholarships, to help active members attend conferences, which helps formalize the relationship between the retiree charter and the region.

A significant concern was the growing trend in some school districts for administrators to affiliate with unions like the Teamsters. This has led to a large increase in union dues, causing some members to reconsider their ACSA membership. The San Francisco region has a long history with a separate administrators' union, where the school district once paid for ACSA dues, but now administrators must pay a special rate to remain members. Overall, the reports show that while there are active strategies for engaging retirees, issues with communication and broader union trends are impacting membership.

## **X. Concluding Remarks**

**Marc** concludes the meeting by discussing a few final points.

- **STRS Audit Transparency:** There is a **trailer bill** and a new law that have increased transparency in how audits are being conducted.
- **Administrative Reminders:** Stephanie reminds everyone to submit their **expense accounts**.
- **Forward-Looking Statement:** Marc expresses gratitude for the attendees and looks forward to working with the group.