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ALASKA STATE LEGISLATURE

Sen. Pat Pourchot, Chairman

Sen. Jan Faiks, Vice Chairman

Sen. Al Adams

Sen. Tim Kelly

Sen. Rick Uehling



P.O. Box V  
Juneau, AK 99811

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Senate State Affairs Committee

February 13, 1989

Sharon Traber  
HCR 64 SRB 401  
Seward, Alaska 99664

Dear Sharon:

Thank you for contacting me to express your support for SB 14, relating to eligible service in the Teachers' Retirement System.

From what I can learn, Sharon, it seems that the provision requiring that teaching service be either full-time or part-time but not a combination of the two was an oversight at the time the law was drafted, rather than an intentional policy decision. It is my sense that there is some support for correcting this oversight.

Another thing SB 14 has going for it is that its fiscal impact would be slight. Because of the small population to which SB 14 would likely apply, the increased payroll contribution required of school districts, the University, and the State Department of Education would be minimal.

SB 14 is currently in the Senate Committee on Health, Education and Social Services. A hearing on the bill has been requested by the bill sponsor, Senator Duncan, but no hearing has yet been scheduled. The next committee of referral is Senate State Affairs, which I chair. I do intend to hear the bill, and assure you I will keep your views in mind as we do so.

Sharon, thanks again for being in touch.

Sincerely,

Senator Pat Pourchot  
Chairman

*Response ?*

RECEIVED FEB 3 1989

HCR 64 SRB 401  
Seward, Alaska 99664  
January 28, 1989

Dear Senator Pourchot:

Because of an unusual interpretation of the Alaska Teachers' Retirement Law, I find myself seeking your help.

Any teacher with twenty years in the classroom, EITHER full-time or part-time, may retire. I, however, cannot retire because my twenty years of service are divided - I have taught ten years full-time and ten years part-time.

The Law defines part-time as at least 50% of a teaching day. I feel that my ten years of full-time (100%) added to my ten years of part-time (50%) should give me the service credit I need. I have been informed that my "100% years" can not be counted as "at least 50%". If I had taught 99% of a day instead of 100%, there would be no problem.

Someone who has taught part-time for 20 years has actually contributed 25% less to the retirement system than I, yet he can retire while I cannot. I am only asking for the same percentage of benefits. The "system" actually gains a 25% 'freebie' contribution from me if they give me a 20 year part-time retirement.

I left full-time teaching when my children were born; I returned to full-time teaching when they entered school. Many women in my profession have done the same - are we to be penalized because we and our school districts felt it was important we spend time with our young children? There are seven other women in the Seward schools with mixed time. Do we all lose the years we varied from full and part-time posts? I have been informed I have two choices - I can either put in TEN MORE years of part-time, or TEN MORE years of full-time. Why do I have to put in 30 years, when other need put in only 20?

Attached please find a copy of a letter from Shirley Forquer of Homer, Alaska. She is fighting the same battle. The letter has all of the information concerning steps she has taken.

Please support Senate Bill 14 as it comes before your body for consideration.

*HSS  
ST Aff  
Fih*

Sincerely,



Sharon Traber

*no fiscal impact on state, but  
increased payroll contribution  
by Univ, DOE, school districts.  
think oversight in law - never intentional.*

*Duncan has requested  
hearing - not scheduled  
yet. (HSS).*

HCR 41545 Dewberry Pl.  
/ Homer, Alaska 99603  
December 7, 1988

Dear NEA Delegate Assembly Member,

Prior to 1986, half-time teachers in the Teachers' Retirement System had to put two half-time years together to count for vesting and retirement. That meant that half-time teachers were not eligible for vestment until they had taught 16 years, and that they could not get the "20 and out" until they had taught for 40 years.

In 1985, HB 228 was introduced by Sund, Davis, Miller, et al. As I understand it, the wording in the original bill was such that it would have taken care of the problem we are up against now. Apparently due to financial consideration, the bill in its final form ended up reading as follows: "A member is eligible for a normal retirement if the member ... (7) has at least one-half year of membership as a part-time teacher for each of 20 school years."

Thinking that with my nine full-time years and eleven half-time years I would fulfill the "at least" provision of the bill, I inquired at TRS about my status. I was flatly denied, along with Sharon Traber of Seward who has 10 and 10.

TRS feels that the bill was passed to give teachers who made a "career" of half-time teaching a chance to retire. I have no quarrel with letting 20 year half-time teachers retire. I do not feel, however, that it is fair to deny the third category of career teachers the chance to retire. Anyone who has taught a combination of full and half years for 20 years in the State has put more time and money into the system than the 20 half-year people. TRS is telling us that we must double up our half-time years and teach anywhere from 25 to 30 years total to get the same right everyone else has at 20 years.

I have been working with Rep. Navarre and Swackhammer, and Sharon Traber has been working with Sen. Szymanski and ~~Duncan~~ Kertulla in trying to find a way to remedy this problem. I talked with Judy Salo on November 30 and she suggested that I write to the DA members so you would be sure to address the situation at Delegate Assembly in January. Following are some of the points that need to be considered.

1. TRS is in good monetary condition and should not be denying retirement to teachers who have put their time and money into the system.

2. To date (12/88) no one has become eligible to retire under the 20 half-year provision. Apparently only a tiny number of teachers will ever be eligible. Was it passed as someone's special interest bill?

3. Teachers with combination years are not asking to be paid the same monetary benefits as a 20 year full-time teacher -- only that we be given the right to retire in the same number of years as everyone else.

4. Our 20 years of combined time are just as "career worthy" as someone else's 20 full-time or half-time careers.

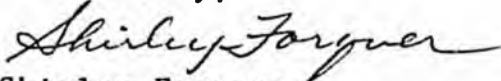
5. The word "part-time" in provision 7 of the retirement options effectively denies a teacher mobility in moving between half and full-time positions. For example, if a person teaches half-time for 15 years and suddenly finds themselves in the economic position of needing to teach full time (death of a spouse, divorce, spouse loses job, etc.) TRS would immediately cut their 15 years to  $7\frac{1}{2}$  years of membership credit. By switching to full-time, the person would have to now teach  $12\frac{1}{2}$  more years to take the 20 and out option. Otherwise, they would have to stay with the half-time position. If they switch, they will end up teaching  $27\frac{1}{2}$  years for the 20 and out.

6. Someone who teaches for 10 full-time years first and then switches to half-time for whatever reason (raising a family, medical condition, etc.) is just as bad off. They would either have to keep teaching full-time, or teach 20 more years as a half-time teacher for a total of 30 years to fulfill the 20 and out provision.

If all the above sounds confusing, please believe it is to any teacher who has both full and half-time years in their career. It is also very frustrating, because option seven in AS 14.25.110(a) should not have done that to us. Getting a bill introduced with a simple word change is our best hope of curing this inequity.

Rest assured that the people at TRS are going to put up a fight. I strongly feel however, that we are being denied equal rights, and that they should be working for the people in their system instead of against them.

Yours truly,



Shirley Forquer  
Teacher, Nikolaevsk Elem/High  
Phone 235-8317 home  
235-8972 work

cc: Rep. Navarre  
Judy Salo