

# **Reports to the 2021 Representative Assembly**

**April 23-24, 2021**

## TABLE OF CONTENTS

WEAC Committee Members	3
WEAC Standing Committee Reports	4
Community Outreach & Family Involvement Committee	4
Education Support Professionals Committee	6
Human & Civil Rights Committee	7
Legislative Committee	9
Quality Education Committee	11
WI Early Career Educators	14
WEA Academy, Incorporated	18
WEA Credit Union	20
WEA Insurance Trust Report	22
WEA Member Benefits Report	25

## WEAC COMMITTEE MEMBERS

### Community Outreach & Family Involvement Committee

DJ Ehrike, Chair  
Denise Engstrom, Vice Chair  
Jessica Galameau  
Anne Gallagher  
Eric Gullickson  
Kathleen Kelley  
Jennifer Kramer  
Andrew Mente  
Rachel Schlueter  
Christina Brey, Staff Liaison

### Credentials & Elections Committee

Mary Loeffler, Co-Chair  
Tiffany Primeau, Co-Chair  
Deb Bell  
Mindy Duford  
Kobao Kong  
Dianne Lang  
Connie Martin  
Joyce Matthews  
Madelyn Seis  
Ann Willis  
Christina Ripley, Staff Liaison

### Educational Support Professionals Committee

Patricia Sebranek Chair  
Stacie Christensen, Vice Chair  
James Pfeifer  
Amy Pinkos  
Catherine Schuett  
Nina Scott  
Diana Talatzko  
Qiana Wilson  
Joey Roeth, Staff Liaison

### Governance Documents Committee

Miranda Beninger, Chair  
Steve Wright, Vice Chair  
Alli Dezurik-Otto  
Mauricio Garzon  
Randy Goss  
Cinnamon Theder  
Jane Weidner  
Rebecca Ferber Osborn, Staff Liaison

### Human & Civil Rights Committee

Jen Voigt, Chair  
Alaura Cook, Vice Chair  
Margaret Danielson  
Angela Harris  
Caitlyn Mohr  
Amoreena Rathke  
Kathleen Ryan-Harpt  
Nick Schwei  
Kelly Sullivan  
Liz Fernandez, Staff Liaison

### Legislative Committee

Bryan Milz, Chair  
Tammy Johnson, Vice Chair  
Patti Clark-Stojke  
Julie Meyer  
Peter Opps  
Stephanie Rapach  
Sagar Tolani  
Sarah R. Watson  
Torre Edwards, Staff Liaison

### Political Action Committee

Ron "Duff" Martin, Chair  
Bryan Milz, Vice Chair  
Carrie Bergum  
David Doering  
Pam Georgeson  
Valerie Morey  
Melissa Rohrbeck  
Patricia Schmidt  
David Sullivan-Konyn  
Katie Vogt  
Peggy Wirtz-Olsen, Ex. Officio  
Kim Schroeder, Ex. Officio  
Bob Baxter, Staff Liaison

### Quality Education Committee

Rick Erickson, Chair  
Gina Pagel, Vice Chair  
Justin Belot  
Lorie Erickson  
Justin Kamp  
Christine Kierzek  
Mary Shampo  
Jeff Baas, Staff Liaison

### WI Early Career Educators

Elizabeth O'Leary, Chair  
Katelyn Klieve, Vice Chair  
Todd Andersen-Goldworthy  
Jessica Bodart  
Allyson Craft-Henshaw  
Travis Eales  
Kyle Emmert  
Zachary Geiger  
Tessa Maglio  
Karen Vance  
Barry Walsh

**Community Outreach and Family Involvement**  
**Submitted by: DJ Ehrike, Chair**

The WEAC Community Outreach and Family Involvement Committee strives to improve union connections at the state level, while also supporting local associations to do the same.

**Charge #1:** Provide guidance for parents to help them better navigate virtual/online learning during a time of school shutdowns or closures, when a school applies virtual or online learning.

**Accomplishments:** The committee served on a joint panel to develop, publicize and conduct a series of WEAC Parent Webinars. See all at [www.weac.org/parents](http://www.weac.org/parents).

**Work to be completed:** Discussion has been had that another series of webinars may be planned going forward. If so, the committee will continue work around that effort.

**Charge #2:** Review and make recommendations to the WEAC president and executive director for any revision to the current scholarship application. Add the member number to application.

**Accomplishments:** The applications were reviewed and recommended changes were sent to the WEAC president and executive director.

**Work to be completed:** This charge has been completed.

**Charge #3:** Review and make recommendations to the WEAC president and executive director pertaining to current WEAC on-line communications and publications focusing on enhancing our ability to connect with members, potential members, and the community. The committee should pay particular attention to diversity of membership represented in communications.

**Accomplishments:** The committee conducted a review of online and electronic publications.

**Work to be completed:** This charge has been completed.

**Charge #4:** Review and refine the new web property, as well as provide input on Phase II of the project as the newsletters and communications templates are transitioned to a format complementary to the web site.

**Accomplishments:** The group provided feedback during the complete redesign of all web properties, including the redesign of all WEAC e-newsletters.

**Work to be completed:** This charge has been completed.

**Charge #5:** Review scholarship applications according to WEAC Policy Article 5.0, 1.G. and provide selections to the WEAC president and executive director at the February meeting.

**Accomplishments:** Selected 2021 scholarship recipients and provided that information to the WEAC president and executive director.

**Work to be completed:** This charge has been completed.

**ESP Committee**  
**Submitted by: Patricia Sebranek, Chair**

**Charge #1:** Review ESP scholarship applications and recommend recipients to the WEAC president and executive director by February 2021.

The committee had one scholarship application to review. All qualifications were met. Scholarship of \$1,000.00 was awarded to Ian Sweet from South Milwaukee. This charge has been completed for 2020-2021.

**Charge #2:** Provide recommendations to the WEAC president and executive director for sessions and encourage ESP members to submit proposals for the 2021 ESP Academy held with the WEAC Professional Development Institute.

A list of recommendations for workshop subjects were submitted to President Martin. This charge has been completed for 2020-2021.

**Charge #3:** Create and plan two ESP drive-in, one-day conferences called Recharge Saturday Conferences (the conferences, if not virtually, will be planned in the southern half and northern half of the state). The conference should include a session focused on racial justice and issues related to the work of ESP.

Due to COVID, the conference will be held virtually on April 17, 2021. Two members were trained in Hustle communications and it went well with a great response.

**Human and Civil Rights Committee**  
**Submitted by: Jen Voigt, Chair**

Each year, the WEAC Human & Civil Rights Committee takes on a series of charges that align with WEAC's commitment to equity in education.

**Charge #1:** Write a letter for approval by the WEAC president and executive director to sign on behalf of the organization that is addressed to school district superintendents focusing on issues related to race and the opportunity gap that exists for our children of color, and citing generic examples of issues our members are experiencing, and how we are willing to work with districts to offer PD as well as other activities to address racial equity in our state.

**Accomplishments:** After forming subcommittees, a small group tasked with writing this letter met on October 15, 2020 to complete this charge. On October 26, 2020, WEAC issued a letter to all state public school superintendents inviting them to join us in our work for anti-racist schools. Here is a link to the letter on the WEAC website: [WEAC to Superintendents: Join Us in Our Work for Anti-Racist Schools](#)

**Charge #2:** Promote racial minority membership involvement by recommending appointments to the WEAC president and executive director for various WEAC committees, conferences and activities.

**Accomplishments:** After discussions about this charge, the committee would like WEAC to consider the creation of a Racial Equity Committee or Caucus which would be in line with other states like North Carolina and California.

**Work to be completed:** The committee should connect with the WEAC Ethnic & Minority Affairs Caucus to better understand their work and determine if there are goals between our committee and the caucus that overlap. The committee also seeks information on current WEAC practices regarding the promotion of racial minority membership involvement. Additionally, the committee is interested in a partnership with the newly formed Educators of Color Advisory Council moving forward.

**Charge #3:** Encourage members to submit nominations for WEAC and NEA HCR Awards (particularly the WEAC Lewandowski Award).

**Accomplishments:** The committee nominated Tyra Perine for the WEAC Lewandowski Award for Humanitarian Activities, Reggie Jackson for the Carter G. Woodson Memorial Award, Project 16:49 for the Reg Weaver Human and Civil Rights Award, and Congressman Mark Pocan for the Virginia Uribe Memorial Award for Creative Leadership in Human Rights. We have also developed a plan to streamline our work on this recurring charge including the use of a shared document to begin collecting ideas for potential nominees, and a Google Form to be shared with members in our locals to generate a more comprehensive list of potential nominees. It is our understanding that Tyra Perine has been named the recipient of the WEAC Lewandowski Award for Humanitarian Activities. We anxiously await the outcomes of the NEA HCR Awards.

**Work to be completed:** The HCR Committee recognizes this is a recurring charge and has taken some steps to help us complete this charge more efficiently in the future.

**Charge #4:** Make recommendations for sessions for the 2021 Professional Development Institute that are focused on racial and social justice concerns.

**Accomplishments:** The HCR Committee recommends that WEAC Leadership establish a theme of Racial & Environmental Justice for the 2021 Professional Development Institute where all sessions examine content through an equity lens. Additionally, the committee recommends that WEAC considers Dr. Bettina Love as a keynote speaker, Angela Harris as a facilitator for a workshop on Making Black Lives Matter at School, and focused workshops based on and inspired by the NEA Leaders for Just Schools program. LFJS workshops might include “A Deeper Dive into ESSA” and “Establishing Equity Teams”.

**Work to be completed:** The HCR Committee recognizes this is a recurring charge.

**Charge #5:** Identify exemplary language from district employee handbooks that reflects racial equity, strong labor-management collaboration and policies and practices designed to promote safe and just schools at every level.

**Accomplishments:** The HCR Committee recommends the language of charge #5 be changed to include district student handbooks.

**Work to be completed:** HCR Committee members will obtain copies of their district employee and student handbooks for review over the summer identifying exemplary language regarding racial equity, strong collaboration between employees and administration, and practices designed to promote safe and just schools at every level. We will share our findings when we return in the fall.

**Charge #6:** Review and make recommendations to the WEAC president and executive director related to WEAC adopting and implementing comprehensive Restorative Justice practices and professional development opportunity ideas for WEAC members.

**Accomplishments:** The HCR Committee recommends a collaboration with the Quality Education Committee as we move forward with this charge.

**Work to be completed:** This is an ongoing charge.



**Legislative Committee**  
**Submitted by: Bryan Milz, Chair**

The WEAC Legislative Committee develops the WEAC Legislative Agenda for consideration by the Board of Directors, develops recommendations on legislative initiatives advanced by membership, and improves advocacy opportunities for WEAC Education Activists.

**Charge #1:** Continue to promote and engage WEAC RA delegates in contributing funds to the NEA Children's Fund for the 2021 WEAC RA, whether held virtually or in person.

**Accomplishments:** We will continue the basket auction, providing opportunities for WEAC RA delegates, NEA RA delegates and local presidents to bid on the baskets.

**Work to be completed:** This is an ongoing effort to build contribution support for the NEA Children's Fund.

**Charge #2:** Begin work on the biennial legislative agenda, giving particular attention to:

- a. Close the digital divide and the homework gap by making broadband internet access a public good available to every community, to remedy the disparate access barriers experienced in Black, brown, indigenous and remote communities.
- b. Ethnic studies curriculum and culturally responsive education.
- c. Restoration and strengthening civics education in public education.
- d. Election days as federal holidays.
- e. Enacting free, fair and accessible elections that address the long-standing practices of voter suppression and discrimination in Black and brown communities.

**Accomplishments:** WEAC, in partnership with other organizations, has worked with Governor Evers to have expanded broadband internet access available to every community in Wisconsin.

- a. <https://psc.wi.gov/Documents/broadband/WisconsinBroadbandPlan2021.pdf>
- b. Charges 2b-2e are being introduced through Proposed Resolutions at the 2021 WEAC Representative Assembly and are included in the legislative agenda.

**Work to be completed:** WEAC works with public sector and private sector union coalitions, along with other advocacy organizations, to expand free, fair and accessible elections as well as to prevent voter suppression legislation from becoming law.

**Charge #3:** Add to the WEAC Legislative Agenda to fully fund bilingual-bicultural education in public schools.

**Accomplishments:** Added to WEAC Legislative Agenda

**Work to be completed:** WEAC is working with the Department of Public Instruction through its budget development process to increase and build full funding for bilingual-bicultural education in Wisconsin's public schools. Wherever possible, WEAC seeks opportunities to partner with other public school advocacy organizations.

**Charge #4:** Review the NEA Legislative Agenda and identify items that should be promoted in Wisconsin through our communication platforms.

**Accomplishments:** The WEAC Legislative Committee looks for opportunities to link member education and mobilization efforts in support of the NEA Legislative Agenda initiatives.

**Work to be completed:** More focus is necessary to build back-home lobby teams so that members have expanded opportunities to meet with their legislators and members of Congress to pursue the NEA Legislative initiatives. This requires ongoing support from urban and rural areas to develop these back-home lobby teams.

**Charge #5:** Review the work plan to restore collective bargaining to ensure it complies with the WEAC Legislative Agenda.

**Accomplishments:** WEAC, with its coalition partners, is successful in getting the restoration of collective bargaining rights included in Governor Evers' 2021-23 biennial budget proposal. Mobilization efforts are under way and plans are in place for the introduction of separate collective bargaining rights legislation in the event collective bargaining rights are not part of the state budget that is signed into law.

**Work to be completed:** WEAC will seek to have the Governor introduce the full restoration of collective bargaining rights in every biennial budget. If those efforts are not successful, WEAC will seek to have legislation proposed in every legislative session until we succeed in the restoration of collective bargaining rights. This cycle will continue until we are successful.

**Quality Education Committee**  
**Submitted by: Rick Erickson, Chair**

The Quality Education (QE) Committee met virtually several times throughout the 2020-21 school year (10/10/20, 12/03/20, 2/20/21, 03/29/21). Additionally, subcommittees met virtually to work on specific charges. QE Committee work has been focused on engaging our members, providing quality professional development, supporting Aspiring Educators and Early Career Educators, and supporting families during the pandemic. The committee is supported extraordinarily well by our staff liaison, Jeff Baas. This past year we addressed six charges.

**Charge #1: Meet by conference call with the WEAC members of the DPI Professional Standards Council to share the charges of the QE Committee and to get an update on the PSC current work.**

**Accomplishments:** The Quality Education Committee Chair shared QE charges with WEAC members of the Professional Standards Council (PSC), and WEAC PSC members shared a summary of their work. The QE Committee met by conference call with WEAC members of the PSC at 10 am on February 20, 2021 during the QE February meeting. The PSC chair shared a letter written to the State Superintendent. The letter urges the State Superintendent to encourage meet and confer in districts across the state in an effort to promote teacher voice. The PSC indicates in the letter the belief that increased teacher voice will lead to increased teacher retention at a time when we are struggling to keep teachers in the profession. The QE Committee sent a recommendation to WEAC President Martin to write a statement in support of the PSC letter.

**Work to be completed:** The conference call was positive, and both committees recognized the value of continued collaborative conversations. The QE Committee believes this should be an ongoing charge so that we can work in unity and promote each committee's efforts.

**Charge #2: Work with appropriate staff to review evaluations from the 2020 Professional Development Institute to assist in the preparation and planning for the 2021 Professional Development Institute.**

**Accomplishments:** Each year, the QE Committee helps plan the Professional Development Institute (PDI). Additionally, the QE Committee annually reviews PDI evaluations and suggests modifications to the conference to best serve WEAC members. The 2020 PDI was fully virtual. There were 152 individuals registered for the 2020 PDI. The QE Committee will continue to work toward recruitment of teachers and ESPs to better balance the attendance of teachers, ESPs, and Aspiring Educators. The 2021 PDI will be held November 5-7 in Oshkosh.

The 2020 PDI featured Anton Treuer as the keynote speaker focused on equity and Act 31 efforts. Dr. Treuer also offered a book study later in the year to supplement the keynote address. The QE Committee recommends a continued effort to recruit a high-profile keynote speaker to help build PDI attendance. The QE Committee has selected Matthew Kay as the 2021 keynote speaker. He will also provide a follow-up book study. The QE Committee recommendation to fund that speaker has been approved, and Matthew Kay has been contacted.

**Work to be completed:** The QE Committee will meet one time in the summer of 2021 to evaluate PDI session proposals, select presenters, and develop plans for the 2021 PDI. The QE Committee recognizes this will be an ongoing charge.

**Charge #3: Write a curriculum for the Aspiring Educators program that will focus on understanding the profession and professionalism, learning about students, educators as advocates, unionism, and other topics that are of interest. The curriculum will be geared toward a local Aspiring Educator chapter and a yearlong program. The committee will work collaboratively with Aspiring Educators and Early Career Educators through a temporary work group facilitated by the Quality Education Committee.**

**Accomplishments:** The QE Committee has developed an outline for the Aspiring Educators curriculum. The program will consist of several “units/components.” The first will provide information related to WEAC as an organization - who is WEAC, how is WEAC structured, how can WEAC help you as a professional, and how can you become involved in WEAC. The remainder of the components will focus on the Core Values: Advocacy, Collaboration, Professionalism, Social Justice, and Economic Security.

**Work to be completed:** Members of the QE Committee and the staff liaison will meet with President Martin to determine the next steps for this curriculum. The committee is willing to work to complete slide presentations and develop a list of potential WEAC members willing to present to Aspiring Educators chapters.

**Charge #4: Work with the leaders of the Aspiring Educators to develop recommendations related to teacher preparation programs. These recommendations will be provided to the WEAC president and executive director.**

**Accomplishments:** The QE Committee worked with leaders of Aspiring Educators to develop a survey related to what is working and what is not working in teacher preparation programs. Aspiring Educators leaders distributed the survey to its members. The results of that survey are being gathered and organized and will be shared with WEAC President Martin.

**Work to be completed:** Work on this charge is complete.

**Charge #5: Continue to review the Louisiana, South Dakota and California handbooks for new educators and make recommendations for a Wisconsin handbook. The committee should work collaboratively with the Early Career Educators in reviewing the document that should be ready to promote and distribute to new educators in the fall of 2021.**

**Accomplishments:** The QE Committee has developed an outline using the WEAC Core Values as the guiding structure. The committee pulled materials they deemed helpful and universal from other states’ handbooks. New WEAC specific information was included. Members of the QE Committee will meet with President Martin to review the draft document and determine next steps toward finalizing the new educator handbook.

**Work to be completed:** Members of the QE Committee and the staff liaison will meet with President Martin to determine the next steps for this handbook.

**Charge #6: Provide guidance for parents to help them better navigate virtual/online learning during a time of school shutdowns or closures, when a school applies virtual or online learning.**

**Accomplishments:** Several QE Committee members and several Community Outreach and Family Involvement Committee members served on a subcommittee chaired by WEAC Vice President Peggy Wirtz-Olsen. This subcommittee worked in partnership with WEAC and Regional staff to create a WEAC website presence and develop and implement a series of four webinars to help parents navigate virtual/online learning. The sessions are described below.

- Session 1: Social & Emotional Needs & Mental Health held on Tuesday, Nov. 10<sup>th</sup> with two sessions, one for Pre-K through 5<sup>th</sup> grade parents, family members, and caregivers and a second for 6<sup>th</sup>-12<sup>th</sup> graders
- Session 2: Navigating Online Learning Platforms held on Tuesday, Nov. 17<sup>th</sup> with two sessions, one for Pre-K through 5<sup>th</sup> grade parents, family members, and caregivers and a second for 6<sup>th</sup>-12<sup>th</sup> graders
- Session 3: Academic Supports & Resources held on Tuesday, Dec. 1<sup>st</sup> with two sessions, one for Pre-K through 5<sup>th</sup> grade parents, family members, and caregivers and a second for 6<sup>th</sup>-12<sup>th</sup> graders
- Session 4: Special Education Needs held on Tuesday, Dec. 8<sup>th</sup> with one session, one for Pre-K through 12<sup>th</sup> grade parents, family members, and care-givers

Resources were developed by WEAC members, presenters and external partners. Links to relevant content were provided to participants. Recordings of these webinar sessions are currently available at [weac.org/parents](http://weac.org/parents).

**Work to be completed:** Work on this charge is complete. However, the QE Committee has agreed to continue to work with Vice-President Wirtz-Olsen if WEAC decides to continue this effort.

**Wisconsin Early Career Educators (WECE)**  
**Report to the WEAC Representative Assembly**  
Submitted by: Elizabeth O’Leary, WECE Chair

The Wisconsin Early Career Educators Committee met five times throughout the 2020-2021 school year with meetings in October, November, December, February, March, and April, all via zoom to ensure safety during the COVID-19 Pandemic. The committee reviewed how WECE can connect and support the Aspiring Educator program as well as provide a smoother transition for AE members to active union members, development of a statewide Early Career Educator (ECE) network and events, ECEs and teacher retention, review the presence of ECEs in WEAC publications, building leaders within WECE and WEAC SLA, continued work on creating comprehensive labor union education for ECEs, and creating resources for locals and regions to better support and create smaller networks of ECE’s.

**Charge 1: Brainstorm ways that the Wisconsin Early Career Educators can connect with the Aspiring Educators in meaningful ways. The committee should review the similarities between both groups of educators as how they are different. The committee should make recommendations to the WEAC president and executive director on how Wisconsin Early Career Educators can help Aspiring Educators see what opportunities exist in the union after graduating from college. Finally, the committee will make recommendations to the WEAC president and executive director on how the WECE’s can support the Aspiring Educator program.**

**Accomplishments:** The WECE committee has met and worked with the Aspiring Educators in various capacities this year. A group of members were a part of a panel at PDI that was attended by many AE members. WECE committee members also presented about WECE and joining the union at an Aspiring Educators Board of Directors meeting, and will present again in April/May to talk about joining the union to those members who are graduating. This year there has been very high engagement between Aspiring Educators and WECE on our social media platforms, mostly on Instagram. Members are engaging on our posts, as well as answering questions. They are receiving lots of information through our social media platform. WECE members also attended a Secondary Conference at UW Whitewater for Aspiring Educators. In March, each WECE member identified which AE chapter is close to them or where they graduated from, and committee members reached out to establish a connection with the chapter. Personal relationships with individual chapters are crucial to establish working partnerships.

**Work to be completed:** It is critical that there is a continued relationship with Aspiring Educators Board of Directors and at the individual chapter locations. In a meeting with WECE chair and AE Board president, it was recommended that the chair of this committee meet with the AE Wisconsin president two times yearly. It is also clear that aspiring educators need support in helping their graduating members connect with the union once they are hired. WECE can create documents or information to show a clear and easy way to join your local when hired. We also could create a map of locals and regions that is easily found in order to show AE members how large our community is. WECE should create a presentation target at AE to help transition.

**Charge 2: Develop and recommend to the WEAC president and executive director ideas for ECE Conferences and how to establish a statewide network of ECEs.**

**Accomplishments:** WECE has worked with WEAC Vice President Peggy Wirtz-Olsen to have a session at the Summer Leadership Academy for early career educators. Molly Walsh Anderson (our previous chair) and Elizabeth O’Leary (WECE chair) are also a part of the summer leadership planning team. WECE has also been a part of PDI panels and sessions in order to provide sessions catered to ECE’s. This year WECE created a private Facebook group for members only. This is a space open to discussion and posts, where our network can grow and build in solidarity. WECE has created a document to keep track of all members and non-members who have attended or been interested in one of our events or in our committee. WECE has also hosted three different “WECE Recess” networking and learning opportunities for all educators, but specifically early career educators. The pandemic led us to hold events virtually, which we found some success in being able to reach people who may not usually be able to attend an event put on by the union. WECE has worked to establish a stronger presence on our social media pages and this year we have had high engagement on our Instagram.

**Work to be completed:** WECE members should continue to connect with WEAC leadership around Summer Leadership Academy, and make sure it is a worthwhile and positive opportunity for early career educators. It will also be a space to allow for discussion and solidarity, look into emerging voices or power locals. WECE should also continue to have a role in the WEAC’s Professional Development Institute (panel of WECEs or have WECEs apply to lead sessions). We also discussed supporting and encouraging more early career educators to run for delegate status to the WEAC and NEA Representative Assemblies. WECE should establish a plan for WECE’s Facebook private group and to find a way to encourage more early career educators to join the group, so they are able to access information on opportunities provided by WECE/WEAC. WECE should continue to provide virtual events a couple times a year, and consider hosting a face-to-face event in partnership with locals or regions.

**Charge 3: Continue to review data for teacher retention, specifically looking at early career educators who join the union and stay teaching vs. those who do not join and leave the profession. The committee should then develop a survey for Wisconsin Early Career Educators on specific needs related to the teaching profession. The committee should analyze the data and make recommendations to the WEAC president and executive director on teacher retention (statewide WEAC goals).**

**Accomplishments:** WECE conducted a survey in spring 2021. One hundred and ten people filled out the survey that was multiple choice and short answer questions. Through the survey we learned many things. Our target audience for WECE is union members who are early career educators; we should continue to host events and opportunities for those people. Early career educators have an interest in learning and engaging in work around social and racial justice, mental health, financial literacy, networking, and being in spaces to process the events of the pandemic and being an early career educator.

**Work to be completed:** It was clear through our survey that ECE’s need for more mental health support includes learning to advocate for yourself in the union and workplace. It is crucial that WECE provides opportunities to share with each other about conditions and experiences in different districts. WECE should also look at new hire information and create ways to reach early career educators who are union members.

**Charge 4: The committee will also review WEAC publications analyzing the material to check to see if they recognize Early Career Educators in the publications; the results should be shared with the WEAC president and executive director.**

**Accomplishments:** The committee looked through various WEAC publications and found recognition of early career educators, as well as information that was relevant to them. The images, some events, and political action were particularly engaging to early career educators. There were many Youtube videos that could be used to recruit and/or support ECE's. Also, the committee determined that Instagram is a social media platform that is a good way to connect with ECEs, but is not currently being utilized very effectively to engage with ECEs. The WECE committee worked with WEAC staff to secure a spot on the WEAC website. Through our social media platforms, we have been able to share each other's events and information to reach diverse audiences. The committee engaged in work around the elections in 2020 and supported voting efforts. The committee also created a google form for WEAC members to nominate an ECE for our ECE highlights. This is to help in gathering data about early career educators who are interested in leadership and to celebrate our educators.

**Work to be completed:** WECE should work with WECE staff to provide more information on the website that clearly shows who and what WECE is. Our website location should also include opportunities for professional learning and networking for ECE's. It should also include a section for locals/regions to find resources our committee has created. WEAC should work to create engaging stories and content on their Instagram, that the WECE committee and Aspiring Educator chapters can share in order to build a stronger presence on that social media platform. The WECE committee will continue to update the content on the WECE Facebook page and WECE webpage on the WEAC website regularly.

**Charge 5: Develop and recommend to the WEAC president and executive director ideas to build leadership skills within the Wisconsin Early Career Educators.**

**Accomplishments:** WECE was able to be a part of many WEAC events where we are able to present and provide opportunities for early career educators, this includes SLA, PDI, and Aspiring Educator events. For Summer Leadership Academy, the committee recommends that locals are encouraged to bring ECEs with them as a part of their leadership teams to engage and develop ECE leaders without separating them from other WEAC SLA attendees. The committee also recommends that there should be some sort of gathering or time as a part of WEAC SLA dedicated to ECEs for socializing, networking, etc. As a prize for our WECE Recess, we gave two members the opportunity to attend a professional development for free. Both those members did attend the event and enjoyed it very much.

**Work to be completed:** There is a desire for learning and advocacy around racial and social justice by early career educators. The committee and WEAC should provide professional development or networking opportunities that support educators in being an anti-racist, and understand their own biases and prejudices. WECE should continue to examine their own ability to create spaces where people of color and underrepresented communities feel welcomed, valued and safe, as well as creating opportunities to hear and learn from our colleagues of color and celebrate their voices. The committee should use our collective voice to take action in creating equitable opportunities for our students and colleagues and support our members in being active in their communities. The committee can also continue to work with the WEAC Vice President and the PDI team regarding WEAC events and the engagement of ECE.

**Charge 6: Develop the next components of a comprehensive education about labor unions.**



**Accomplishments:** The WECE committee created a presentation to talk to potential aspiring educators and early career educators about joining the union and what WECE is. The committee also created a “Why Join” sheet to better understand the benefits of the union and is currently working to finish a Frequently Asked Questions Resource. The committee also worked to gather resources which currently exist from NEA and WEAC that will be easily shared.

**Work to be completed:** WECE should continue to create resources to understand the union, specifically around the different levels of union and how they are structured. It is also important to share the resource document with educators and locals. The committee should also work to complete the Frequently Asked Questions document in order to easily share the resource.

**Charge 7: Develop and recommend to the WEAC president and executive director a how-to manual for locals and/or regions to create a network or committee of Early Career Educators and suggestions on how to connect and engage early career educators in the local.**

**Accomplishments:** This year WECE created and edited a presentation that is ready to go for locals, regions, and WEAC members about how to talk about WECE, but also provide learning around recruiting and engaging early career educators. WECE members also presented to the WEAC Board of Directors about the WECE committee and the work we are doing. We heard feedback and gathered information around what locals/regions have and need regarding early career educators. WECE had many discussions and determined it would create resources that support locals/regions as they engage early career educator members and potential members from when they are first hired throughout their first 10 years of teaching. WEAC website has been inclusive of WECE and we hope this will reach more leaders.

We have also created a WECE flyer and a Why Join Flyer that locals can use to talk to early career educators.

**Work to be completed:** The WECE committee should continue to connect with the WEAC BOD and with local and region leaders. The committee should also look into other areas of WEAC where they can attend or be a part of the event in order to connect and share about the information we have gathered. WECE should also work to create more resources that locals and regions can use for recruitment, such as a “How to Join” they could give to members. WECE should also establish clear ways to communicate with local/region leaders to talk about events and different opportunities they could share with their members, as well as have their ECE members join our Facebook group.



### **WEA Academy Board Members**

Peggy Wirtz-Olsen, President & WEAC Board Liaison

Jennifer Voigt, Vice President

Steve Wright, Treasurer

Diane Slivka, Secretary

Jessica Galarneau

Tom Zigan

Rebecca Letter

Amanda McIlhone

Tammy Gruen

**Our mission:** *To promote high quality public education by providing access to professional and personal learning, education resources, and collaboration.*

**Our values:** *We value collaboration and credibility with a commitment to quality.*

**Our vision:** *Within two years, WEA Academy will increase its visibility while responding to individual and district needs with innovative and diverse offerings. - Renewed November 15, 2020*

In 2018, the WEA Academy took on a strategic planning process to redefine our role in professional development, which led to an overhaul of our mission, vision and values statements along with a new direction to better serve educators and WEAC members today and tomorrow. In 2020, we continued to make progress in implementing our plan and in advancing the mission of the WEA Academy despite the challenges we faced with the global pandemic.

Our accomplishments include continuing to move forward with our strategic plan through development of new courses, book studies, and webinars. We directed our marketing toward WEAC members and non-members in hopes of recruiting all educators to join with our union's collective voice, as well as marketing to education allies and partners. We are committed to offering professional development that is relevant, timely, easily accessible, and affordable. We have developed a streamlined promotional video to introduce ourselves, which is easily shareable on our newly updated social media platforms of Facebook, Twitter, and Instagram. We have launched a redesigned website that is easy to access and easy to use. We continue to make progress in our goal of becoming educators' first choice in professional development.

We continued our work in advancing the cause of racial and social justice in education through our book studies on *Teaching for Black Lives* with author and editor Jesse Hagopian and *Everything I Wanted to Know About Indians But Was Afraid to Ask* with author Dr. Anton Treuer.

The WEA Academy will continue to make professional development in equity and racial justice for all students a priority in our offerings.

Our work continues as we evaluate and update course offerings for educators in the future. The WEA Academy is marketing our courses to school district leadership, recognizing that educator-led professional development is more effective and fiscally sound for districts as well. If your local union and your school district is looking to partner with the WEA Academy for professional development, please reach out to us. Going forward, we hope to continue to grow our course offerings, especially offerings that meet the needs of ESP members, and to feature more member educators as instructors.

### **Notable Examples of Our Progress in 2020-2021:**

- *Wednesday Webinars* Professional Development Series in partnership with WEAC & NEA
- *Building a Balanced Life* Course in partnership with Steeping Wellness focused on health and wellness for educators
- NEA GPS Planning Grant on Racial and Social Justice in Education
- 2020-2021 Book Studies:
  - *Teaching for Black Lives* with author and editor Jesse Hagopian
  - *Everything You Ever Wanted to Know About Indians but Were Afraid to Ask* with author Dr. Anton Treuer
  - *Drive: The Surprising Truth About What Motivates Us* with Barb Van Doorn
- Revamped Classroom Management Course developed by Early Career Educators
- *Foundations of Reading Test (FoRT) Preparation* Aspiring Educators (Pre-service teachers)
- *Distinguished Educator Series*--educators share their knowledge, expertise, and experiences via self-paced video
- Micro-credentials-personalized learning experiences for educators at [Micro-Credentials - Wisconsin Education Association Council \(weac.org\)](https://weac.org)
- Increased presence on social media
  - On Facebook at <https://www.facebook.com/weacademy>
  - On Instagram here: @wea\_academy
  - On Twitter here: @WEA\_Academy

**You can check out our entire list of Course Offerings at <https://weac.org/weacademy>**

The WEA Academy is committed to high-quality, educator-led professional development, and we believe that educators can and should have a voice in their professional development. We remain committed to bringing new, relevant, and engaging professional development opportunities to educators as our Union continues to expand its advocacy around professional practice issues, National Board support and mentorship, and Educator Effectiveness. We will continue to assess that our courses meet our own standards of quality. We hope that you will join us by signing up for one of our courses or any of our professional learning opportunities.

Respectfully submitted,

Peggy Wirtz-Olsen  
President, WEA Academy



WEA Credit Union was established by WEAC in 1931 as a member cooperative that would offer a wide range of financial services to the teachers of Wisconsin. The credit union would provide them with a safe place to deposit their savings and obtain reasonably priced loans. The reasons for developing a credit union in 1931 during the Great Depression hold true even today. There are still predatory payday lenders who take advantage of unwary borrowers and profit-hungry banks who charge high fees for services. WEA Credit Union serves its members by offering them a safe place to save, a low-cost place to borrow while keeping fees minimal. All deposit accounts are federally insured by the NCUA up to at least \$250,000 and IRAs are separately insured up to \$250,000. All income that the credit union earns from loans and investments is returned to its members after reserve requirements and office expenses have been funded.

WEA Credit Union members elect a volunteer board of directors to govern the credit union. Since credit unions are democratic organizations, each member has one vote regardless of the amount of money they have on deposit.

During 2020, the credit union granted 1,320 loans for a total of more than \$8.9 million. Reserves of the credit union are very strong with a net capital ratio of 11.43% - far above the regulatory, well-capitalized minimum of 7%. The credit union also opened 164 new member accounts during the year.

With all of our mobile apps, WEA Credit Union offers our members 24-hour access to their accounts. With these services, members can make deposits, transfer funds between accounts, apply for a loan, pay bills, or check a balance anytime from anywhere. They can even receive a text message or email when balances change in their accounts. Members can also pay their bills online with our Bill Pay service or snap a picture of the bill and pay using our Picture Pay feature. Our app allows members to keep tabs on their debit card balance and block or unblock their card. As always, WEA CU is actively researching ways to improve service to members and is committed to providing convenient, safe, and secure ways for members to manage their money.

WEA Credit Union offers many ways for our members to save money. Firstly, fees are minimal or non-existent. For example, the WEA CU MasterCard and Gold MasterCard programs have no annual fee, no balance transfer fee, and a very competitive interest rate. We even pay to use the card by offering 1% cash back. In 2020, MasterCard users earned more than \$17,000 in cash back rewards! In addition to our free Basic Checking, the Premiere Checking account is fee free as long as members keep at least \$100 in the account. Premiere account holders also enjoy a .25% discount on personal loans in addition to 1% APY on the first \$2,000 (minimum balance of \$500). WEA Credit Union members enjoy some of the best rates in the state!

Another advantage of being a member is that we belong to the CO-OP Shared Branch Network. There are over 5000 shared branches nationwide where WEA CU members can transact business just like they were in our office. There are more than 60 shared branch locations in Wisconsin alone. Members can locate a shared branch on-line at [www.weacu.com](http://www.weacu.com).

Many other services are available through WEA Credit Union including:

### **Savings Plans**

Daily Deposit Savings  
Premiere Share Draft – checking (free if balance remains above \$100)  
Basic Checking (no monthly fee, no minimum balance)  
Money Market account—higher yield account  
Christmas and Vacation accounts  
Traditional & Roth IRA's and Coverdell Education Savings Accounts  
Share Certificates—3 months to 5 years

### **Loan Programs**

#### **New and used auto loans**

Personal loans  
MasterCard & Gold MasterCard  
Kwik Cash-overdraft protection  
First mortgages  
Second mortgages  
Interest free loan to obtain National Board Certification  
Retirement mortgages  
Home equity line of credit loans (HELOC)—no annual fee

### **Special Services**

Shazam debit cards—no annual fee  
Domestic wire transfers  
Notary – free service for members  
Medallion signature guarantee – free service for members  
Payroll deduction and direct deposit  
Automatic loan payment  
Automatic Transfers  
Credit score counseling  
Loan application on-line ([www.weacu.com](http://www.weacu.com))  
Internet home banking ([www.weacu.com](http://www.weacu.com))  
Mobile banking  
Online membership application  
Bill Pay

### **Board of Directors**

Chairman	Russ Allen	Director Joanne Fitzgerald
Vice Chair	Terrance Craney	Director Ross Hampton
Treasurer	Douglas Fritsch	Director Michael Stoll
Secretary	Kathryn Nauta	



## WEA Trust Report to WEAC Representative Assembly April 2021

---

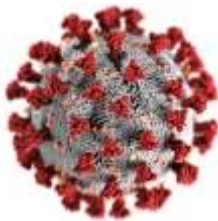
### **WEA Trust Marks 50 Years of Service**

In 1970, WEAC established the WEA Trust to be an organization governed by and dedicated to our members. At the time, it was the only organization of its kind in the country that was intended to give public school employees a meaningful voice in their health care benefits. It is still a “one-of-a-kind” organization today. At the time of its founding, the WEA Trust was given the charge to remain committed to the well-being of its members over all other considerations. While much has changed, that commitment to our members has never wavered.



In 2020, the WEA Trust celebrated its fiftieth year of service to its members. Over the years, the WEA Trust has withstood economic downturns, a global pandemic, competitive challenges, and more than its share of political attacks. But, the WEA Trust has survived and thrived. Today, our members enjoy the same member-focused service that defined us in 1970. We continue to drive health care innovations to control costs for our members. And, we have a passion for doing what is right for our members. We are well positioned to survive and thrive for another 50 years of service to our members.

### **WEA Trust Resilient in the Face of COVID-19 Global Pandemic**



In March of 2020, when the threats of the COVID-19 Pandemic became clear, WEA Trust leadership moved quickly to transition all employees to remote work. Within a matter of five days, our 45 Nob Hill headquarters were emptied and 100% of employees were transitioned to a virtual work environment. As a result of our ability to provide remote work options for all employees, WEA Trust employees have experienced a remarkably low rate of infection. Staff engagement and morale has remained high. And, our service to members has been uninterrupted throughout the global emergency. We expect our offices to reopen sometime in 2021, but many of our employees will also choose some hybrid virtual work opportunities as well.

In addition to the resiliency of our staff and operations, overall financial performance of WEA Trust has remained strong. In 2020, WEA Trust net assets increased by more than \$55M. Total consolidated assets of the WEA Trust are now approximately \$868M. The strength of the balance sheet offers stability to the organization and ensures its ability to cover future benefit obligations estimated at \$520M for members in our health, life, long term disability and long-term care plans.

## Growth & Expansion for the WEA Trust's Future

A challenging marketplace, complex health care needs, and demands for new products have all required WEA Trust to find new ways to compete, grow, and expand. As a result, WEA Trust now has acquired ownership interests in a number of new business entities.

Since the 1980s, WEA Trust has owned WEA Insurance Corporation. In 2019, the family of affiliates grew to include Health Tradition Health Plan, Inc. a licensed HMO serving both public and private sector employees in 58 counties throughout Wisconsin. Most WEA staff now work for NeuGen, LLC a shared service organization that provides administrative services to the WEA Trust family of companies. In 2020, WEA Trust also became the majority shareholder of Kii, Inc. a musculoskeletal technology company that provides innovative lower back and other joint programs to members of WEA Trust plans as well as those in other plans around the country.



## WEA Trust's Innovative Health Care Solutions

Our members, whatever plans they participate in, have access to multiple Enhanced Care Solutions that help them manage their health conditions and healthcare costs. These programs also assist in reducing members' co-pays and deductibles, remove barriers to access, improve patient outcomes, and reduce readmissions. Among these innovative programs are the following:

- **CareSignal** (new in 2020) a remote health monitoring tool that helps provide care management for members with any of a variety of conditions: depression, chronic obstructive pulmonary disease (COPD), high blood pressure, or a need for post-hospitalization discharge support.
- **Cologuard** (new in 2020) is an at-home colorectal screening option for members 50 to 75 years of age which is a cost effective and less invasive collection system.
- **The Ovation Hand Institute** (new in 2020) expands our bundled surgery services to include a less invasive carpal tunnel procedure.
- **Kii**, a low back pain management program with a virtual physical therapy mobile app for members. Kii is in the process of expanding their services to include neck, knee and hip pain management.
- **WEA Trust + INTERLINK™ CancerCARE**, a program that provides members diagnosed with cancer a second review to avoid an incorrect diagnosis and personalized support throughout the cancer journey.
- **Amwell-Primary Care** - a medical virtual visit for members to quickly access medical advice.
- **Amwell-Behavioral Health**-a behavioral virtual visit option for member mental health issues.
- **Livongo** - a diabetes management program to assist members in managing diabetes.



## WEA Trust Membership Remains Strong

WEA Trust was fortunate to see membership growth in 2020 despite challenges of the pandemic and the new virtual work environment. This growth can be attributed to a dedicated workforce that was able to quickly adapt to the remote work mandate and collaborate on solutions to keep service to members uninterrupted. At the end of 2020, the combined enrollment of WEA Trust and Health Tradition Health Plan was 111,554 members, up from 108,314 in 2019. Life and Long-Term Care members contribute an additional 21,834 members.

	WEA Insurance Corp. Members	Health Tradition Health Plan Members	Trustee Election Voters (WEA Subscribers)
WI State Employees	52,982	0	25,168
WI School District Employees	35,406	30	13,022
WI County & Municipal Employees	11,355	0	3,502
WEA-MedPlus	7,656	0	5,739
Life	8,912	0	7,267
Long Term Care	12,922	0	8,067
Private Sector Employees	0	4,155	0
<b>Total</b>	<b>129,233</b>	<b>4,185</b>	<b>62,765</b>

## Nuestro Mundo – WEA Trust’s Adopt-a-School Partner



2020 marked the fifth year that WEA Trust served as Nuestro Mundo’s Adopt-a-School partner. Although there were limited in-person activities in 2020, the partnership offered many volunteer opportunities for WEA Trust employees. In early March, the WEA Trust hosted the 4<sup>th</sup> annual fifth-grade Career Day and saw the students and teachers one last time before working remote. In November, WEA Trust employees resumed a pen-pal program through email exchanges with more than 50 staff volunteering as pen-pals for the fifth graders.

## 2021 WEA Trust Goals

In 2021, WEA Trust will focus on efforts around reducing Medical Loss Ratio (MLR) (the difference between premiums collected and benefits paid) and the growth of Health Tradition Health Plan. Most of these efforts fall within the following key themes:

- **Population Health:** By understanding health conditions of the different populations that exist within our membership, we can ensure we have the right solutions for each member’s unique journey. Engaging members in these solutions is essential in reducing medical costs.
- **Health Tradition Health Plan:** Membership growth in eastern and northwestern Wisconsin.
- **Building the Digital Front Door:** Continue to build out this new digital experience for members with the goal of making engagement easy and personalizing their experience as members.



## **WEA Member Benefits**



At Member Benefits, we believe in helping public school employees and their families achieve their financial goals by providing personal insurance, retirement and investment, and financial planning programs that are designed specifically for the education community. Our vision, “every member financially secure,” is at the heart of what we do, and we’ve been helping public school employees become financially secure for almost 50 years. Because we are a member-focused organization, our personal insurance, retirement savings, and financial planning programs are designed with unique qualities that set us apart from other providers.

Member Benefits offers competitively priced, high-quality auto, home, condo, renters, umbrella, equipment breakdown, and flood insurances; life insurance; long-term care insurance; financial planning services; an industry-leading individual retirement account (IRA) program; and a world class 403(b) tax-sheltered annuity (TSA) program. We also offer financial education and 403(b) plan sponsor consultative services to school districts free of charge. Year after year, we continue to receive high customer satisfaction ratings and we are proud of the exceptional service we provide our members.

### **COVID-19 Pandemic**

The COVID-19 pandemic fundamentally shifted our business and service model in 2020. We emptied the office of most personnel on Monday, March 16, and pivoted our operation to a remote work-from-home model on a full-time basis. Because we are considered an essential business, we were able to keep a few staff in our building taking care of the day-to-day operations that had to be done in the office. We anticipate returning to the office later this year once it is safe to do so.

All in-person meetings, seminars, individual consultations, and appointments were cancelled due to Governor Evers’ stay-at-home order. Fortunately, we were able to transition quickly to a virtual meeting environment utilizing online video for individual and group presentations. The COVID-19 pandemic has pushed all of us to adapt to new and different ways of communicating and receiving services that we believe can be leveraged after the pandemic has passed.

### **Out-of-State IRA Program**

We became licensed and began marketing our IRA platform in six additional states. For the initial phase, we used a soft-launch approach targeting members who previously had a relationship with us but since moved out of state. We are now marketing our IRA program in Illinois, Iowa, Minnesota, Michigan, Arizona, and Florida. In 2020, we opened 39 accounts in these states with total assets of \$2.78 million.

### **WEA FA Registered With the SEC**

WEA Financial Advisors, Inc., secured registration with the Securities and Exchange Commission (SEC) in 2020. This change moved us from state regulation to a federal regulatory authority. This change makes it easier to

conduct business outside of Wisconsin. This move fulfilled two objectives: the first was compliance with SEC assets under management rules (due to the model portfolios), and the second was expanding our ability to offer the Personal Investment Account (PIA) program to members residing in other states. We have 14 out-of-state PIA accounts with total assets of \$407,300.

The PIA program can be used for nonqualified money such as an inheritance, proceeds from the sale of a property, and required minimum distributions. It's a way to invest money outside of a retirement account without using a cash account such as savings, checking, or certificates of deposit.

### **Premium Relief**

We saw a decrease in auto claims in April and May due to Governor Evers' stay-at-home order. Therefore, we returned \$250,000 to our members in premium relief payments in June. The calculated refund was 15% of the earned premium of auto policies for April and May. We also offered premium relief by extending payment dates and waiving nonsufficient fund fees.

### **SECURE Act**

In December 2019, the Setting Every Community Up for Retirement Enhancement Act of 2019 (better known as the SECURE Act) was signed into law. The bill is far-reaching and has a significant impact on employees, employers, plan providers, advisors, and the entire retirement plan industry. Among the many changes are modifications to required minimum distribution age rules, distribution requirements for retirement account beneficiaries, and approval of open multiple employer plans. We evaluated the provisions of the new law and implemented process changes as appropriate. We continue to monitor the impacts of this law for our 403(b) and IRA programs.

### **CARES Act**

In March 2020, the Coronavirus Aid, Relief and Economic Security (CARES) Act was signed into law. The CARES Act was an unprecedented \$2 trillion coronavirus relief package. Several provisions directly impacted our 403(b) and IRA programs. These provisions included an extended IRA contribution deadline to July 15, 2020, a coronavirus-related distribution that may be allowed in 403(b) plans and our IRA program, 403(b) loan limits increased to \$100,000 or 100% of their vested account balance, 403(b) loan payment postponement, and 2020 required minimum distribution waivers.

### **Regulation Best Interest**

Regulation Best Interest (Reg BI) became effective in June 2020. Reg BI establishes a "best interest" standard of conduct for broker-dealers and associated persons when they make a recommendation to a retail customer of any securities transaction or investment strategy involving securities, including recommendations of types of accounts. As part of the rule-making package, the SEC also adopted new rules and forms to require broker-dealers and investment advisers to provide a brief relationship summary—Form CRS—to retail investors. We have taken all necessary steps to comply with this regulation.

### ***Wisconsin State Journal's* Top Workplace Award**

Last fall, we entered the *Wisconsin State Journal's* Top Workplaces Competition, which is run by Energage. Member Benefits is pleased to announce we have been named a 2020 Top Workplace! Although we have won a number of workplace awards over the years, this was the first year Member Benefits entered this competition.

## eBooks

Member Benefits has created a series of eBooks available for download on our Web site. The popular series includes topics like the Wisconsin Retirement System, ten financial tips for new educators, student loan forgiveness, what to do when you lose a loved one, and buying a home. We launched two new digital eBooks in 2020—*Identity Theft* and *Women and Retirement*.

## your\$™

Each year, we distribute our quarterly *your\$* magazine to over 55,000 member households and other critical publics. The magazine provides financial information relevant to Wisconsin public school employees and includes member stories. Past issues of *your\$* are available on our Web site at [weabenefits.com/yours](http://weabenefits.com/yours) or by requesting paper copies. Member Benefits continues to offer a free one-year subscription to nonparticipants to introduce Wisconsin public school employees to our programs. This year we offered a new digital version of our magazine.

## Student Art Contest

Member Benefits, along with the WEA Member Benefits Foundation, sponsored our fifth annual student art contest in 2020. We received over 160 submissions (K–12) from across Wisconsin that included drawings, paintings, photographs, 3-D art made from recycled items, and jewelry. Eleven pieces were selected to be on display at our office for twelve months. Ten individual student finalists were honored and received \$500 each. In addition, one student artist whose art exemplified originality, expression, use of artistic elements, principals of design, overall presentation of artwork, and message was awarded the “Loeymae Lange Memorial Best in Class” award and received \$1,500. The “Best in Class” award is named in memory of Loeymae Lange, who taught art at Cooper Elementary School in Burlington, Wisconsin, for 30 years. Her brother, Dr. Paul Lange, and his wife June have graciously honored Loeymae’s legacy and love for art by providing this memorial gift to the WEA Member Benefits Foundation. Our sixth annual contest is currently underway.



## WEA Member Benefits Foundation, Inc.

The WEA Member Benefits Foundation (Foundation) launched in March 2019 as a 501(c)(3) nonprofit public charity that supports Wisconsin public education through grants and charitable donations to public educators, public schools, and the communities they serve. The Foundation has spent the last several months launching our matching gift program with Member Benefits’ business partners, conducting a comprehensive series of fact-finding sessions with public education stakeholders throughout Wisconsin, determining primary focus areas for our

philanthropic strategy, and building relationships with key organizations that can join us in pursuing that strategy. More information about the Foundation can be found at [weabenefits.com/foundation](http://weabenefits.com/foundation).

### **Don't Be Jack™ Financial Literacy Game for the Classroom**

*Don't Be Jack—High School Edition* was created in response to requests from educators to release a student version of the game to use in the classroom. The game focuses on financial literacy topics and provides educators with the tools and expertise they need to teach financial literacy in the classroom and is provided at no cost. The game recently won an Excellence in Financial Literacy Education (EIFLE) award for “game of the year” from the Institute for Financial Literacy.

### **Community Service**

In 2020, Member Benefits' community giving, which includes United Way and other special events, totaled over \$36,000. We also continued our support for Whitehorse Middle School through the Foundation for Madison Public Schools' adopt-a-school program. We worked with Whitehorse on several teacher appreciation events and other outreach opportunities for their students in 2020, including designing and underwriting the cost for t-shirts and a custom Zoom background with Whitehorse logo for their staff use. Staff also participated in the Foundation for Madison's Public Schools school supply and backpack drive in the fall.

### **Preferred Pricing**

Member Benefits continues to add value to WEAC membership by offering preferred pricing for members. Programs with preferred pricing for WEAC members include:

**IRA—Annual Fee Cap**: WEAC members have a reduced annual fee cap that is \$150 less than nonmembers.

**Financial Planning Services**: WEAC members receive up to a \$100 discount on the [Retirement Income Analysis](#) service. WEAC-Retired members receive an additional \$50 discount on this service for a total savings of \$150. In addition, a complimentary one-hour financial consultation is available for members.

**Auto and Home Insurance Discount**: WEAC members receive an additional 3% base premium discount on their auto and home insurances. The discount applies to [condo](#) and [renters](#) insurance policies as well. This discount is in addition to the other 13 available discounts, including an auto insurance young educator discount where educators under the age of 25 receive a 25% discount.

### **Highlights of 2020**

Through the dedicated efforts of the Trustees and staff and the invaluable communication and support of union leadership and members, every Member Benefits program experienced growth during 2020. Highlights for the year include the following:

- The total number of accounts in the retirement savings programs increased 3.1% to 60,513. Account balances in these programs total over \$5 billion.
- The annual premiums for our personal insurance programs are \$26.3 million. Our insurance programs now total 25,831 policies. We include Epoq, an online legal document service, with all our home, renters, and condo policies and now offer specialized insurance for classic cars and trucks.

- We paid 1,800 claims in 2020 totaling \$9,120,000. Auto losses were down slightly in April and May mostly due to people driving less because of the pandemic. Home losses trended with the five-year average.
- We provided 665 financial planning services to assist members in managing their retirement accounts and planning for their retirement. Many of these, 97.1%, are the complimentary one-hour consultation. Our financial planning services include the complimentary one-hour consultation and the following fee-based services: Portfolio Analysis, Retirement Income Projection, and Retirement Income Analysis.
- The retention rates for our programs remain high with the insurance program at 89.9%, the TSA program at 95.9%, and the IRA program at 96.1%.
- In August 2019 we began using a short two-question survey at the end of phone calls to determine a customer satisfaction rating. Callers were asked **how likely they are to recommend WEA Member Benefits' products and services to a friend, family member, or colleague.** Post-call survey results are exceptional with a score of 4.8 out of 5.
- We expanded our surveying practice from just surveying when people have transactions to an annual random sampling survey. In December 2020, we conducted our third annual perception survey. The net promoter score, which is a measure of customer satisfaction that considers how likely members are to recommend our organization to others, improved from a 53 in 2019 to a 57 in 2020. This compares to 2020 industry average scores of 41 for insurance carriers and 49 for the brokerage and investment industry. Scores above 50 are considered excellent.
- Our TSA program is in 431 school districts and is the only program used in 98 districts. In addition, there are 315 districts using our plan documents (as opposed to an outside third party) to comply with IRS regulations.
- The Roth (after-tax) 403(b) program is offered in 380 school districts. There are 6,710 accounts, and the assets in the program total \$21.4 million.
- Since 2015, we have been offering model portfolios as an investment option in our TSA and IRA programs. Model portfolios are a predefined portfolio based on your age, risk tolerance, and retirement timeline. Model portfolios automatically rebalance each year so your investment mix aligns with your investment goals. At the end of 2020, 2,479 TSA accounts invested \$225.9 million in the model portfolios. In addition, 1,223 IRA accounts have invested \$78.4 million in the model portfolios.
- In 2018, we began offering Personal Investment Accounts. Personal investment accounts provide investment opportunities outside our 403(b) and IRA programs. At the end of 2020, there are 357 accounts with assets totaling \$23.3 million.
- During 2020, Member Benefits offered 151 financial and educational seminars with over 423 opportunities for individual one-on-one consultations (in-person and online during pandemic). We presented to more than 6,760 school district employees. In addition, our PICs offered 5,166 property and casualty insurance quotes to our members.

## Looking Forward

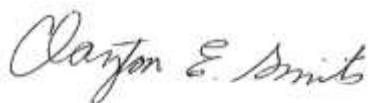
We are developing plans to return staff to our building. We are evaluating our operational needs to determine if they have changed over the past year. We will begin transitioning staff back into the office when we feel it can be done safely.

The future is exciting for Member Benefits. Without a doubt, we will face our share of challenges, but we are optimistic that we are positioned well and with the talent and commitment of our staff, we will succeed. As we look forward to the future guided by our vision, our efforts will focus on making it simple and convenient for every public school employee to do what is necessary to achieve her/his dream of financial security.

In 2021, we will continue to investigate new strategic partnerships both inside and outside of Wisconsin and look for opportunities to expand existing strategic relationships. These partnerships will allow us to grow our existing programs and provide new programs to help us achieve our vision of *Every Member Financially Secure*.

As we prepare for 2021, we are focusing on the best and most efficient ways to grow out of state. We will evaluate products, services, and platforms we can most easily implement, as well as evaluating the possibility of partnering with other state member benefit groups and NEA Member Benefits.

We will continue to partner with the union leadership to expand benefit offerings. We believe that Member Benefits can play a large part in your organizing efforts as our programs add value to WEAC members' lives by improving their financial well-being. Our success is due to our commitment to and our strong partnership with members, union leaders, and others who work in public schools. We appreciate your ongoing support and ask that you refer your colleagues to us for all their retirement savings and insurance needs. Together we can ensure every member is financially secure.



Clayton Smits, Chairperson  
WEA Member Benefits