



From the President...

Farewell can wait

I was going to make this my farewell article as PRO President by thanking so many people for their contributions over the nearly ten years I have been in office, but something else is more urgent and important to all PRO members.



Debby Weintraub

Our lifetime benefits are under attack, yet again. This time the attack has come in the form of changing the concept of “open enrollment.” Open enrollment is the annual period when everyone enrolled in PCCD’s health benefits has the opportunity to change their and their dependents’ coverage plan. In the past, retirees have always been able to switch from the district-offered PPO to Kaiser or vice versa. This year the District has announced that this will be the last time that Kaiser will be available to retirees. That means that if you do not choose to remain in or switch to Kaiser by October 31, 2023, Kaiser will no longer be available to you as a plan option.

I hope that all of you have received your newsletter from PCCD and have been informed that:

- “If you remain on Anthem MAPD or the United American Plan, SISC (Self-Insured Schools of California) Kaiser Senior Advantage plans will NOT be an option going forward.”
- “Please note if you are currently enrolled in SISC Kaiser Senior Advantage Plan and switch to one of the other plans, you will not have the opportunity to re-enroll in SISC Kaiser Senior Advantage in the future.” (Retiree Newsletter from Peralta Benefits Office)

We have entered a new era of our health care coverage. SISC is the entity from which Peralta now buys health insurance for actives and some retirees. The new system, which began January 1, ended Peralta’s long-running self-insurance where Peralta was able to control the rules to one in which the rules are made by SISC. This

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is due in great part to the fact that PFT and SEIU agreed to sign up with SISC without fully examining what it would mean going forward, certainly not for retirees or for the current employees who are still entitled to lifetime benefits.

The Chancellor and the Board of Trustees went along with the decision as well. The District is no longer in control of what coverage is available to retirees. For example, even Dr. Ronald McKinley, the Vice-Chancellor of Human Resources, says that the District did not know until this open enrollment period that Kaiser will not be an option for retirees in the future. According to McKinley, this decision was made solely by SISC. As Bruce Jacobs so succinctly put it during the initial discussions about PCCD leaving their self-funded health care to join SISC, “Retirees will just be the collateral damage.”

Therefore, we need to start learning all we can about SISC in ways in which we may be able to maintain a voice in our health care coverage. The District Benefits Committee has been a place where PRO has been active and it would make sense now to ask that someone from SISC be present at those meetings, or at least be invited at times, so retirees can hear first-hand what changes are being planned for retiree health care and develop relationships with the organization that currently controls our health care. In addition, you need to keep in touch with your elected representative on the Board. Trustees

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President's Message

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should be speaking on behalf of their constituents; they should be bringing up our concerns, so let them know how you feel and what you want as a voter and retiree of the district.

PRO members need to make time to go to Board of Trustee meetings and, if necessary, engage with our former unions and speak to other retirees about issues of concern to us, so we remain a meaningful organization. I don't know if my suggestions will have any significant impact on maintaining our lifetime benefits as we have enjoyed them over the last six decades, but we must try. Through our activism last fall, we managed to retain our right to stay on traditional Medicare with a supplement instead of being forced on to Medicare Advantage.

What we need to do now is advocate loudly and consistently for our contract with the district to be honored. This may mean that the District will have to offer an individual Kaiser plan to retirees who wish to switch to Kaiser in the future AND reimburse them for any decrease in benefits.

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What I fear is that next year SISC will once again restrict our options during "open enrollment." I believe SISC has no interest in or reason to keep the contractual agreement PCCD made with the retirees with lifetime benefits. So now it's our problem, and we need to make it clear that it should be PCCD's problem as well.

This brings me back to my original intent for the farewell article. I am proud of the work PRO has done over the years to advocate for retirees and to keep retirees of PCCD connected and informed, as well as continuing to give to the students at PCCD by distributing scholarship funds every year. I am enormously proud of the work we have done on retirees' behalf in the last 18 months.

However, after more than 20 years of being actively engaged in advocacy for my colleagues in the district by serving in leadership positions in both PFT and PRO, I need to step back. I do not know who will come forward now, so I will make my final plea for folks to become more engaged with PRO. Some of you have, but we need all of you to stand firm and not give up the battle to maintain the retirement health care we worked for and

counted on during retirement. I also implore you to renew your PRO membership and to encourage fellow retirees to join PRO.

I want to thank the PRO board members with whom I have worked over the last 12 years, though I will stay on the Board. People who have given their time to the PRO board—those who do the unseen work such as keeping the data updated, mailing newsletters, writing thank you notes for scholarship donations, reading scholarship applications—all of you make PRO work. Unfortunately, Covid has kept us from our annual membership meetings in November, that Jay Quesada and Linda Japzon made so festive and special.

I appreciate all the help and support I have gotten along the way as President of PRO. However, I am particularly grateful for the multiple hours Bruce Jacobs spent working with me, listening to me, advising me and being the role model of a leader that I admire immensely. Thank you all for letting me serve you—it has been my honor.

PRO's membership on the District Benefits Committee has provided a vital conduit for interaction between PRO and the Benefits Office. Therefore, since SISC now virtually controls our health care benefits, an SISC representative should be present at all Benefits Committee meetings so that PRO can develop a direct relationship with SISC and can hear first-hand what changes are being planned for our health care. ♦

Peralta Retirees Organization

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The Reimbursement Morass

By Bruce Jacobs

Morass: a complicated or confused situation.

For Peralta retirees the reimbursement process is indeed a morass. At this point, there are three situations that warrant a reimbursement from the District. The processes are different, and there are different entities with which the retiree has to deal.

1. Medicare

All of us who are over 65 and who have enrolled in Medicare must pay a premium for Medicare Part B. Those of us who are high income pay additional premiums (called IRMAA-Income-Related Monthly Adjustment Amount). We pay the premiums either through a deduction from our monthly social security check, our STRS check, by submitting a monthly payment, or some combination of two or more of these. But the contract we retired with says that the District will reimburse us for any payment of these kinds of premiums.

These reimbursements are administered by an outside contractor (in the past Pension Dynamics and CBIZ, now Navia Benefits). To get this reimbursement, you must register with Navia on their web site and submit proof of your Medicare premiums (annually or if you pay monthly, each month) and information to allow for Electronic Funds Transfer of your reimbursement. Once your account is set up with Navia you will get monthly transfers to the specified bank account.

PRO played a large part in getting the District to agree to reimburse retirees whose benefits were reduced.

2. Kaiser Prescription Reimbursement Program

Many years ago, Kaiser would not write a contract with Peralta in which the co-pay for prescription drugs was less than \$5. At the time the contractual agreement between the District and the unions was for a \$1 copay. The District resolved this conflict in the benefits by setting up the Kaiser Prescription Reimbursement Program. To get reimbursed for any prescription cost over \$1, a retiree had to submit a form to the District along with receipts, which showed the amount paid over \$1. The District then processed the submitted form and mailed a check to cover the excess cost.

3. Reductions or Losses in Benefits Due to the Benefits Changes Implemented in January, 2023

When the District changed benefits last January the new benefit programs both reduced and (in some cases) enhanced the benefits that retirees were entitled to. PRO played a large part in getting the District to agree to reimburse retirees whose benefits were reduced.

This could be for many reasons including the provider not accepting Medicare Assignment (i.e., not agreeing to Medicare’s fee schedule), higher drug co-pays, using services that Medicare does not cover but the “old” insurance did pay for, coverage while abroad not covered by the current policy but that would have been covered prior to the change, hearing aid coverage for Kaiser members, etc. The District and PRO worked on both a procedure for submitting reimbursement requests and for resolving conflicts that arose. If there were no conflict, the District would process the reimbursement. Despite the plan, the District Benefits Office allowed a huge backlog to accumulate of unpaid claims. (They are purportedly working through that backlog now and most people who have submitted claims should either get a check or a request for more information shortly.) The request for reimbursement procedure and form are available on the District website and there is a link to them from the PRO website.

(On the PRO website, go to the home page: www.peraltaretirees.org On the right of the home screen click on the paragraph that says, “For health plan information including Navia and Medicare, Advocacy and reimbursement click here.” Then scroll down to the section that says **Peralta Reimbursement Policy**. Links to the Procedure and Form appear at the bottom of that section.)

The District is planning to change the procedure so that the reimbursements are dispensed by an outside contractor, viz., Navia. They promise that this will shorten the process and make for speedier disbursement. We will keep you posted via email and the newsletter when and if the current situation changes. ♦

Newsletter seeks your feedback

We want to hear from you. Do you have ideas for Newsletter articles? Critique of the Newsletter? Letters to the editor? Please direct any comments to me with subject line Newsletter Feedback at burtdragin@aol.com.

—Burt Dragin

PRO members celebrate

Photos by Bruce Jacobs

2010 PRO luncheon



Sondra Neiman and Carol Dalessio



Remo Arancio and Ned Pearlstein



Michael Feiler and Sue Chin



Bunny Moeller, Ralph Marinaro and Shirley Nedham



Jerry Herman and Bruce Jacobs



Matt Goldstein and Roger Newman

through the years . . .

Photos by Bruce Jacobs

2012 PRO luncheon



Shirley Coaston and Myrtle Bennett



Rip Talavera and Vickie Redus

2013 PRO luncheon



Ned Pearlstein and Michael Mills



Ann Whitehead and Toni L' Esperance

2014 PRO luncheon



Bill Lepowsky and Catherine Chrystal

Welcome party for Chancellor Ortiz, 2015



Linda Japzon, José Ortiz and Jay Quesada



Odell Johnson and José Ortiz

OPEB Addendum

By Mark Greenside

It was with interest and pleasure that I read Jerry Herman's brief history and latest update of OPEB in the last PRO newsletter. I am delighted to know that OPEB would help pay the way and protect the General Fund for current employees *and* lifetime benefits of faculty, staff and administrators hired before June 30, 2004.

We have our own histories and own eyes, and see the world through these bifocals. Jerry attributed OPEB to former Peralta CFO Tom Smith. Tom had a vision and he implemented it—but not alone. Jerry credits the Board of Trustees' approval as key to implementation but two other approvals were necessary: in lieu of a public vote, a judge had to approve the implementation language *and* the issuing of public bonds; because health, safety, salary and budget are mandatory negotiating topics under state law, PFT and the other unions had to be involved in the development and approval processes, which, in this case, I know something about.

The process leading to OPEB approval actually began three years before the Trustees approved it. Here's what I recall:

Tom Smith did two stints with Peralta, first with Ron Temple, chancellor 1999 - 2003. Temple sidelined Al Harrison as CFO, used Yvonne Dorrough, and hired Tom Smith. At the time, I was chief grievance officer for the PFT, Chair of the PFT Political Action Committee, a member of the union contract negotiating team, and the District Staff Development Officer, therefore I spent time with administrators at the District Office—and how and why I met Tom.

Negotiations were all about benefits. The Chancellor and the Board were trying to eliminate the PPO option and place everyone in Kaiser, which was about half the cost of the PPO. Benefit costs were increasing 6-10% a year and the costs were becoming unsustainable. This was when Tom explained OPEB to me and how the bonds could protect both the General Fund and lifetime health benefits. He explained that the cost was like a mortgage with a 30-year payment period, including the option to renew and refinance as necessary. He didn't speak about this publicly—the time wasn't politically right.

Like many of us, Tom didn't like working with Chancellor Temple, so he left and became CFO at Contra Costa College. I remained in touch with him and periodically we met and discussed Peralta, OPEB and other things. Two (or so) years later, Temple was gone, Elihu Harris was Chancellor, and Contra Costa College was having major labor disputes. Tom wasn't happy at Contra Costa, and Elihu

was looking for a new CFO. I called Tom and urged him (a lot!) to apply, and when he did I did everything I could behind the scenes to get him hired, because I knew if he was in Peralta we'd get OPEB, as the times had changed and the situation—and Elihu—were ripe for something new and dramatic.

This was around 2003, and, as usual, we were negotiating benefits. Kathy Bauer resigned as President of PFT and Michael Mills replaced her—but Michael was on leave and out of the country when Kathy resigned. Bruce Jacobs, Bob Bezemek (PFT's long-time attorney and another unsung hero) and I negotiated with the District's attorney, Jeff Sloan and Trudy Largent, the District's chief negotiator. Negotiations were hard and often nasty and not going anywhere, as neither side was giving an inch. This is when Tom convinced Elihu about the wisdom of OPEB, and Tom and Elihu sold the idea to the Trustees as a way out of the current negotiating difficulties and something worth pursuing.

Michael was in Thailand visiting his daughter, who was doing Peace Corp work. Michael returned and actively became PFT President. From that point on, he took the lead, working with Tom, the Trustees, the bond and fiscal agents/advisors that the District hired, crafting the language that went to the judge for approval and doing everything for the next year and a half to two years to make sure (1) OPEB happened, and (2) it worked as it was supposed to. No one knows this part of the history better than Michael, and I hope he writes it.

When everything was in place and ready to roll, Tom went to PRO on July 6, 2005 to talk about OPEB and get PRO's support (which PRO gave). Soon after that, the Trustees approved the OPEB package that had been worked out with the unions and supported by PRO, and sent it to the judge for final approval. The bonds were issued, and that's how we got to the happy place we're at today—or at least the happy place we were at before this winter when the unions agreed to the most recent changes that I fully expect will diminish our benefits *and* cost the District and each of us a lot more money. But that's another story for another time....

Meanwhile, PRO, whose leadership has mostly been past PFT Presidents (Jerry Herman, Bruce Jacobs, Michael Mills, Debby Weintraub) continues to fight for and defend retirees' benefits. I thank them and Alex Pappas, "Mr. Benefits for PFT and PRO," and Ned Pearlstein, and many other unsung heroes. All of them deserve a hug and our thanks.

This is my two cents. I hope reading it was worth your time. ♦

Dr. José M. Ortiz joins PRO Board

I am privileged to accept the nomination as a Board member to the Peralta Retirees Organization (PRO).



Dr. José M. Ortiz

I have been a member of the Peralta family since the fall of 2002, when I accepted the position of Vice President for Academic Affairs at Laney College under the leadership of Drs. Ron Temple and Deborah Blue. The ensuing Peralta turmoil led to the resignation of both Dr. Temple and Dr. Blue. Both Laney as an institution and I as an individual were fortunate to have Odell Johnson return as an interim president at Laney. Much of what I had learned as an administrator, I learned from Odell. He taught me not only how to be a top-notch administrator, but also how to navigate the ins and outs of a multi-college district like Peralta.

A year after Odell’s arrival, I was offered the presidency at Allan Hancock College in Santa Maria. Ironically, I was also offered the presidency at Laney a week later. But as it was pointed out to me by my mentor, “you never know what Peralta is going to do.” And so I accepted the presidency at Hancock, where I spent seven years learning how to manage a district, a college, and a governing board.

After what might be considered a successful tenure at Hancock, I was recruited to return to Peralta as chancellor in 2012. While many considered returning to Peralta as ill-conceived, I considered it an opportunity to address some of the many issues facing students and faculty alike throughout the district

My immediate vision for the district was encapsulated in the mantra: “Do the Right Thing and Do Things Right”. One thing I learned as president at Allan Hancock College was that modeling the behavior (service to students and faculty) was not an innate skill, but rather one that required both modeling and explicit training. As chancellor I attempted to bring such training to classified staff and administrators but was rebuffed by faculty leadership who considered my vision as “too corporate.” Regardless of the nomenclature, my intent was simply to instill “accountability” for our work as service leaders.

It was not long before I realized that my vision for Peralta was ahead of its time and thus, so was my chancellorship. I retired in 2015 with my head held high: no

scandals, no deceit, no dubious contracting, and no funny business. I guess I wasn’t a good fit.

My interest in becoming a board member for PRO is to continue to hold the district to its promises to retirees through honest and clear dialogue. There is strength in numbers and I hope to lend my voice to PRO as it continues to defend the rights and promises we are entitled to. *“Do the right thing and do things right.”* ♦

Contributions received for the PRO Scholarship Fund

From **Michael Mills, Roger Newman, Keith Nason, Charles Wollenberg, Marty Schiffenbauer, Jerry Herman, Odell Johnson and Burt Dragin**

In memory of Ned Pearlstein

From **Sue Chin**

In memory of Barbara Wirth

From **Ann Elliott**

In memory of Jennifer Briffa

From **Mark Greenside**

In memory of Bob Grill, Wylie Walthall and Alice Marez

From **Mark Greenside**

In honor of Debby Weintraub, Bruce Jacobs, Michael Mills and Larry Long

From **Jerry Herman**

In memory of Carmen Rezendes and Ralph Marinaro

(Editor’s note: Ned Pearlstein died October 15, 2023. An obituary will appear in our next issue.)

Be sure your PRO Membership is up-to-date —time to renew for 2024

Please check the label on your newsletter to see if your PRO membership has expired or is about to expire. Now, more than ever, being a member of PRO is crucial. Peralta has made significant changes to retiree benefits. PRO is doing everything it can to minimize the negative effects of those changes on retirees and to keep retirees informed.

PRO can take credit for everything from getting the District to offer a traditional Medicare + supplement option and for pressuring the District to agree to reimburse retirees for expenses that used to be covered but are not now. Being a member of PRO supports that work. A PRO membership also pays for the newsletter, the website and our ability to communicate with retirees.

Membership dues are: \$20 one year, \$55 three, years \$80 five years, \$250 lifetime.

You can easily renew your membership either by mail or online.

MAIL

To renew by mail, send a check made out to “PRO” to:

PRO
4200 Park Boulevard #605
Oakland, CA 94602

ONLINE

To renew online go to the PRO website: www.peraltaretirees.org. On the right side of the home page you will see a link, which allows you to pay your dues by credit card through our PayPal account. ♦

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