
Register Now for Winter Conference

Need a prescription to cure the February blahs? The WEAC Winter Conference in Middleton on **February 25-26** is just what the doctor ordered. It offers both professional ("Culturally Responsive Classroom," "Social Media," etc.) **and** union workshops ("Beginning Bargaining," "BR Training," etc.).

Friday night hotel reservations (\$30 single, \$60 double) must be made by **February 1**. The conference fee of \$25 includes: Friday night's meal; breakfast, lunch, and a send-off snack on Saturday; breaks and training materials. Conference-only registration (no hotel) is due by **February 11**.

WEAC is also offering a conference in Wausau on March 4-5. To access details on conference sessions and registration, go to mtea.org (Events).

Retiring in June - Important Advice!

◆ Make your retirement effective date at the end of the day on the emergency make-up day - so MPS pays you for that day even if you don't have to work. The date is based on your work calendar:

Traditional - June 15

Year-round - June 21

IB schools - May 31

◆ Do not submit your retirement/registration notice to MPS until you are absolutely certain you are retiring. The district does not allow employees to rescind once their retirement notice is submitted.

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School Board Recommendations

The MTEA PAC endorsement recommendations for Milwaukee School Board were approved by a wide margin in the online membership vote conducted during the third week of January. The endorsed candidates, along with the percentage of members voting who supported the PAC recommendations, are:

Mark Sain (98%) - For **District 1**

Michael Bonds (89%) - For **District 3**

Meagan Holman (91%) - For **District 8**

Terry Falk (78%) - For **At-Large (Citywide)**

Our union's PAC made no recommendation for District 2.

Primary Election - February 15

There will be a primary election for District 8 where three candidates are vying for the seat now held by Terry Falk. If you would like to help get out the February 15 primary vote, please contact MTEA Executive Director Stan Johnson at 259-1990 or johnsons@mtea.weac.org.

The general election will be held on April 5.

This is a Wisconsin Statute 11.29 communication for MTEA members only.

Contract Talks Resume

Our union's educational assistant (EA) bargaining team met with the school board's team on January 25.

The district had said it would present a comprehensive offer at this session, but it did not. Instead, the board's team presented an outline of several proposals on changing health insurance benefits and an early retirement incentive proposal. These proposals were not explained in detail.

Unresolved Issues Identified

There was a discussion on the overall status of the talks. This was necessary because the teams had not met face-to-face for about a year, and neither side has presented written proposals on several issues. A number of topics have been discussed only in general terms.

Some of the issues on the table include: classroom supervision, professional development, the reassignment procedure, and the unique concerns of school safety assistants, CATP paraprofessionals, and interpreters for the deaf and hard of hearing. The two major issues for all EAs are salary raises and benefits.

Two Sessions Scheduled

The next meeting on February 3 will focus on health insurance and school safety assistant issues. An all-day session is planned for February 11 to take up the rest of the unresolved issues (outlined above).

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◆It may be to your advantage to give MPS formal written notice by **March 1**, as explained below.

Qualifying for Board Premium Payments

To qualify for board-paid health care coverage during retirement, you must be at least age 55, with 15 years or more of MPS employment, and have 812 hours of accumulated sick leave in your full day account.

The board's share of insurance payments will be at the rate in effect for the PPO plan on the day you retire.

Incentive for March 1 Notice

If you qualify for board-paid health insurance, the contract provides an incentive for submitting your written notice of resignation to MPS on or before March 1.

MPS health insurance premium rates usually increase each year, on July 1. If you submit your retirement notice by March 1, the board will pay the rate in effect before July 1 **or** the new rate in effect on July 1 - **whichever is higher**.

If You Retire at Age 65 or Older...

If you are age 65 or older and plan to retire at the end of this school year, you need to apply for Medicare coverage **now** if you have not already done so. You need to enroll so that Medicare coverage takes effect on the first day of the month following your retirement date, which would be July 1 if you retire in June.

If you do not enroll in Medicare in time to start coverage as soon as you retire, Medicare will not pay its portion for doctor bills and other medical services. **You** will have to pay the Medicare portion.

Claiming a Tax Deduction for Union Dues

If you itemize deductions on your federal income tax return, you can include a portion of your union dues along with other expenses that are defined by the IRS as "miscellaneous deductions." The IRS allows a deduction for miscellaneous expenses which, in the aggregate, exceed 2% of your adjusted gross income.

For example, suppose your 2010 adjusted gross income was \$11,000, and the aggregate amount you spent on items which qualify as miscellaneous deduction expenses was \$600. On Schedule A of your federal tax form, you would detail the \$600 in expenses and then subtract \$220, which is 2% of your \$11,000 income. The result would be a net "miscellaneous" deduction of \$380.

Some Union Expenditures Are Not Deductible

Under the federal tax code, union dues spent on legislative lobbying and political action contributions are not deductible expenses for income tax purposes. To comply with the IRS notice requirement, our attorney calculated the lobbying expenses of the MTEA, WEAC, and NEA for 2010, as well as the MTEA and WEAC political action contributions. After deducting all lobbying and political expenses, 67.44% of the MTEA/WEAC/NEA dues educational assistants paid during 2010 qualified as miscellaneous deduction expenses.

Typical Allowable Dues Amount - \$316.24

For many EA members who work more than 20 hours per week, the total amount of union dues deducted during 2010 was \$468.92. If you paid this amount, IRS allows you to claim only **\$316.24** in union dues as a miscellaneous deduction expense ($\$468.92 \times 67.44\% = \316.24).

Determining Your Amount for 2010

To claim the allowable portion of the union dues you paid during 2010, you should take two steps:

1. Check your December 24, 2010 paycheck to find the total amount deducted for union dues during 2010. It will be in the "After-Tax Deduction Box," noted "YTD" (Year-to-Date).
2. Multiply your amount by 67.44%.

Extra Step Required If You Requested a Rebate

If you requested a rebate for your 2010-11 MTEA PAC contribution (\$3.20), your WEAC PAC contribution (\$10), or for WEAC/NEA fair share, you need to take an extra step. You must subtract any rebates you received in 2010 **before** multiplying your dues total by 67.44%.

Available at mtea.org

Our union dues and tax deduction information is at mtea.org. It will be there from now until April 15, for your quick reference.
