**MEA-Retired Tribune**

**January, 2024**

**A “visit” and unwelcome holiday gift from the COVID elf**

Happy New Year to you and your loved ones. I am asking all of my retired educator friends for a pass having taken a holiday from the December edition for a variety of reasons:

* MEA-Retired “adventures”
* Holiday season craziness.
* An unwelcome and unexpected visit from the COVID Elf despite having the latest vaccine a few weeks ago. I think I could have made some sort of snowman figure from all of my discarded facial tissue.
* A number of other health and life “adventures” with family and friends.
* Getting the next issue of the *Michigan Retirement Report* put together.

We hope that you had an enjoyable holiday season with loved ones and wish you peace, health and happiness in the new year.

**Wanted: Lifetime members to meet with Gov. Whitmer**

We were notified by our NEA PAC Captain and MEA-Retired Board of Directors member Bridget Fox that on Thursday, January 11, Gov. Whitmer will be in Grand Rapids to highlight the first phase of the pension tax rollback and would love to speak to retired MEA educators! Bridget has been asked to try to "fill the room" so we are hoping that you can come and also get fellow members from West Michigan to get together, carpool and be a part of this special event.

Due to security reasons, the exact time and location will not be released until early next week, but Bridget says that they are planning on the event occurring late in the morning so that it will make the 6 p.m. news cycle.

***If you are interested in attending or have any questions, please contact Bridget with your contact information ASAP. She can be reached at***[***foxbridget@gmail.com***](mailto:foxbridget@gmail.com)***. At this time, 40-50 people will be part of the event, so those interested will be put on a list; once 50 have volunteered, others will be put on a wait list.***

We thank Bridget for her outstanding political involvement and for getting the word to us about this exciting opportunity.

**REMINDER: Make sure to vote in Michigan’s Presidential Primary**

**Tuesday, February 27, 2024!**

***From ORS:***

**ORS survey sent to randomly selected retirees**

The Michigan Office of Retirement Services (ORS) regularly obtains retiree input. Your input lets ORS know how we are doing and where we can make improvements.  
  
Retirees randomly selected to provide feedback received an email and link to the survey. In this short survey, we’re asking for your input on services provided by ORS. The survey should take ten minutes or less to finish.  
  
***The survey closes at 11:59 p.m. EDT on Friday, Jan. 12, 2024.***

***From ORS:***

**Pension tax changes may affect your tax filing date**The federal and state tax withholding tables are subject to change annually. Tax rates for 2024 will take effect beginning with your January pension payment. The state of Michigan income tax rate will return to 4.25% beginning January 1, 2024. For more information about this change please visit the Michigan Department of Treasury’s [frequently asked questions](https://lnks.gd/l/eyJhbGciOiJIUzI1NiJ9.eyJidWxsZXRpbl9saW5rX2lkIjoxMDEsInVyaSI6ImJwMjpjbGljayIsInVybCI6Imh0dHBzOi8vd3d3Lm1pY2hpZ2FuLmdvdi90YXhlcy9xdWVzdGlvbnMvdGF4LWZhcXMvaW5jb21lLXRheC1yYXRlLWNoYW5nZS9pbmNvbWUtdGF4LXJhdGUtY2hhbmdlLW92ZXJ2aWV3IiwiYnVsbGV0aW5faWQiOiIyMDIzMTIyMC44NzQxNjAyMSJ9.NjkYXw5mxXxuNK8HSYyJMFAifXvnRMWnbRXWvC2I4fU/s/646656558/br/233500510970-l). Because of this, you may notice a change in your tax withholding even though you have not made any changes.

[Public Act (PA) 4 of 2023](https://lnks.gd/l/eyJhbGciOiJIUzI1NiJ9.eyJidWxsZXRpbl9saW5rX2lkIjoxMDIsInVyaSI6ImJwMjpjbGljayIsInVybCI6Imh0dHBzOi8vd3d3LmxlZ2lzbGF0dXJlLm1pLmdvdi9kb2N1bWVudHMvMjAyMy0yMDI0L3B1YmxpY2FjdC9wZGYvMjAyMy1QQS0wMDA0LnBkZiIsImJ1bGxldGluX2lkIjoiMjAyMzEyMjAuODc0MTYwMjEifQ.I5Y7cRIY2SA3kvBfRYVu40J8HPGUCAY072R8oBlz8AY/s/646656558/br/233500510970-l) changes state tax on pension and retirement income. The new law phases in an income tax reduction over four years for retirees who receive a pension, beginning with the 2023 tax year (filed in 2024). It allows qualified retirees to choose between the limitations on the deductibility of retirement and pension income as outlined in the Income Tax Act of 1967, or the new limitations as outlined in PA 4 of 2023. For more information and details about PA 4 of 2023, scroll to the Retirement state tax changes table on the [front page of our website](https://lnks.gd/l/eyJhbGciOiJIUzI1NiJ9.eyJidWxsZXRpbl9saW5rX2lkIjoxMDMsInVyaSI6ImJwMjpjbGljayIsInVybCI6Imh0dHBzOi8vd3d3Lm1pY2hpZ2FuLmdvdi9vcnNzY2hvb2xzIiwiYnVsbGV0aW5faWQiOiIyMDIzMTIyMC44NzQxNjAyMSJ9.tXhk7KgWe90hZcHhKeSA0aDchhzC7n3G6WyXFLzoqGU/s/646656558/br/233500510970-l), or you can view the Ask Our Experts video [State Tax Changes for Public Schools, State Employees, and Judges](https://lnks.gd/l/eyJhbGciOiJIUzI1NiJ9.eyJidWxsZXRpbl9saW5rX2lkIjoxMDQsInVyaSI6ImJwMjpjbGljayIsInVybCI6Imh0dHBzOi8veW91dHUuYmUvdTZ4V3cyMEZ2WWciLCJidWxsZXRpbl9pZCI6IjIwMjMxMjIwLjg3NDE2MDIxIn0.yAuYlWvonPM3FLEtjKKWk0cnM8v77ffHY6gb_RlJ184/s/646656558/br/233500510970-l).

***PA 4 of 2023 takes effect February 13. Therefore, you may see an additional change in the amount withheld for your state of Michigan taxes beginning with your March 2024 pension payment.***

***Retirees who file their taxes before the law’s effective date can file an amended return after PA 4 of 2023 takes effect.***

1099-R forms will be available in miAccount January 1. For information about accessing your 1099-R forms, view our Ask Our Experts video [Accessing Your 1099-R Form](https://lnks.gd/l/eyJhbGciOiJIUzI1NiJ9.eyJidWxsZXRpbl9saW5rX2lkIjoxMDUsInVyaSI6ImJwMjpjbGljayIsInVybCI6Imh0dHBzOi8veW91dHUuYmUvSlBmU1QtdEZBRmsiLCJidWxsZXRpbl9pZCI6IjIwMjMxMjIwLjg3NDE2MDIxIn0.VzVhDinGEfJV3WHbOAYQXd6ov6sopqh0VCib9i81hHA/s/646656558/br/233500510970-l). ORS will mail printed versions by the end of January.

**Kudos!** Congratulations to now-Doctor Cleorah Scruggs-DeBose, a longtime MEA and MEA-Retired activist. She recently earned her Doctor of Divinity degree from Midwest Theological University.

***From mea.org:***

**Big wins for public education at end of ’23 legislative session**

With the end of legislative action for 2023, there were many victories to celebrate for students, educators, and the institution of public education that saw action in Lansing in recent weeks.

**Teacher Evaluations – Fixed** [Senate Bill 395](http://legislature.mi.gov/(S(jolk4snairf3vdvas21drhie))/mileg.aspx?page=getObject&objectName=2023-SB-0395), introduced by state Sen. Dayna Polehanki (an MEA member and former teacher), and [Senate Bill 396](http://legislature.mi.gov/(S(xiyk3cigtiokn53krbksfd3v))/mileg.aspx?page=getobject&objectname=2023-SB-0396), introduced by state Sen. Kristen McDonald-Rivet, were passed and now await the Governor’s signature. These bills do many things to fix the broken evaluation system for educators in Michigan – [learn more about the details here](https://mea.org/key-evaluation-reforms-passed-by-legislature/).

**Default Retirement Changed** [House Bill 5021](http://legislature.mi.gov/doc.aspx?2023-HB-5021), introduced by Rep. Matt Koleszar, changes the 75-day default retirement option from the defined contribution plan to Pension Plus 2. If there is going to be a default, it should be to the plan that encourages retention in the education profession and provides more benefit to our members. This bill was passed by both chambers and now awaits the Governor’s signature.

**Dental Oral Assessment Program Begins** Also passed was [Senate Bill 280](http://legislature.mi.gov/doc.aspx?2023-SB-0280) amending the Public Health Code to require dental oral assessments for children who are registering for the first time in kindergarten or the first grade in a school in Michigan.

**Contact Information for Unions and PAC Payroll Deduction** Two bills passed that are big wins for unions and our members. First, [SB 169](https://legislature.mi.gov/(S(yekohsuoqtfwnia3liccoqlk))/mileg.aspx?page=getObject&objectName=2023-SB-0169) will require public employers to provide employment and contact information for bargaining unit members to the union that represents them. And HBs [4230](https://www.legislature.mi.gov/(S(2ioajqyljbjexxvjz43ghw5o))/mileg.aspx?page=GetObject&objectname=2023-HB-4230) and [4234](https://www.legislature.mi.gov/(S(2ioajqyljbjexxvjz43ghw5o))/mileg.aspx?page=GetObject&objectname=2023-HB-4234) restore the ability for public employees to contribute to political action committees (like MEA-PAC) to help make their voices heard in the electoral progress.

**Many Pro-Public Education Bills Take Effect on Feb. 13** Many pro-education bills did not receive immediate effect in the Legislature in 2023. These bills will take effect on the 91st day after the legislature adjourned, which was on Nov. 14. That means they will take effect Feb 13. This includes:

• The repeal of PA54 (Public Act 113) which allows educators to bargain automatic and ongoing step advancements, automatic increases in employer contributions to insurance, and the ability to bargain retroactive pay.  
• The repeal of prohibited subjects of bargaining (Public Act 115) which allows us to bargain over teacher placement, layoff and recall, teacher evaluations, and discipline.  
• The ability to bargain non-instructional support staff service contracts (Public Act 143).  
• The ability to incorporate the use of seniority in transparent factors used to fill vacancies and conduct staffing reductions (Public Act 116).  
• The ability to have union dues deducted from paychecks again (Public Act 114).  
• The phase-out of the unfair retirement tax and expansion of the earned income tax credit (Public Act 4).

To help you keep track of all this legislation and more, MEA has launched our new Legislative Tracker at [MEA.org/legtracker](https://mea.org/legtracker/). All bills introduced in 2023 continue to be eligible for action when the Legislature returns to Lansing in January.