

## **SUMMARY**

2022 proved to be a challenging, yet productive year for Retired Employees of the City of San Antonio (RECOSA). COVID-era restrictions continued to impact monthly board meetings and quarterly events. There was significant board member turnover during the year due to one notable passing and other resignations of board members who did not have sufficient time to devote to board activities. RECOSA surveyed our membership about the organization, future Brown Bag topics, quality of life activities, and willingness to volunteer with RECOSA. RECOSA continued to work with the City of San Antonio's Human Resources Dept. on retiree benefits, including healthcare premiums, and other issues, and to communicate that

information to retirees. RECOSA also continued to hone online and other digital resources and communications for retirees, and to be good stewards of the generous financial donations we receive – our only source of income.

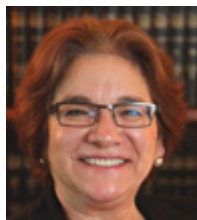
## **BOARD**

RECOSA had a full complement of board members for 2022 following the Nov. 2021 Brown Bag/Annual Membership Meeting. Sadly, board member Rose Rangel passed away late Nov. 2021. In addition, there were three resignations of board members during 2022. Two of the vacancies were replaced by former board members, one by a new board member, and the final vacancy was left vacant for the balance on the year.

### **2022 Board**



**Rebecca Waldman**  
Chair



**Martha Sepeda**  
Vice-Chair



**Liz Garca**  
Treasurer



**Stephen Haney**  
Corresponding  
Secretary /  
Technology Lead



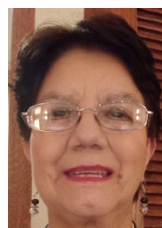
**David Lopez**  
Recording Secretary  
(filled vacancy created by  
Rose Rangel's passing)



**Kevin Burton**  
Online Communications /  
Special Projects Lead  
(filled vacancy created by  
resignation of Dennis Campa)



**Michael Trainer**  
Legislative /  
TMRS Lead



**Diana Alcocer**  
Board Member  
(filled vacancy created  
by resignation of  
Frank Villani)



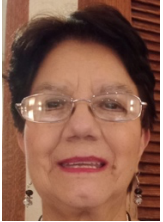
**Vacant**  
Board Member  
(created by resignation  
of Beth Costello)

For the 2023-2024 board election, there were a total five positions with terms that expired Dec. 31, 2022, plus the existing vacancy with term ending Dec. 31, 2023.

A Nominating Committee of Liz Garcia (Committee Chair), Rebecca Waldman, and David Lopez solicited statements of interest from members Sep. 6, 2022 – Oct. 31, 2022.

The Nominating Committee recommended the following slate of candidates for the 2023 board:

**Incumbent Board Members**



**Diana Alcocer**



**Martha Sepeda**



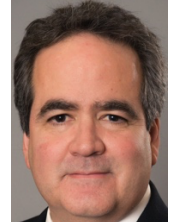
**Michael Trainer**



**Lewis Andrews**



**Nora Chavez**



**Salvador Garza**

*Note: Nora Chavez was elected as a new board member, but subsequently resigned on Jan. 16, 2023.*

**New Board Members**

The RECOSA bylaws provide for nominations from the floor at Annual Membership Meetings. The bylaws stipulate that nominations be accepted from the floor during any in-person election and shall: 1) be members in good standing; 2) be present at the meeting; 3) express their qualifications and interests in serving; and 4) express their availability, willingness to attend meetings, and ability to perform the duties and responsibilities.

At the Nov. 18, 2022, Brown Bag/Annual Membership Meeting, the slate of candidates was presented to the members in attendance. There was a call for nominations from the floor by the Chair and no nominations were received. Member, Nancy Dean, made a motion that the slate of candidates be elected by acclamation, which was unanimously approved by the members in attendance.

Nora Chavez subsequently resigned from the board on Jan. 16, 2023, with the five remaining elected board members (incumbent and new) each serving two-year terms through Dec. 31, 2024. A vacancy remains for a position with term ending Dec. 31, 2023.

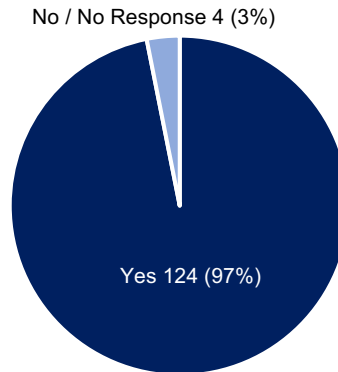
**2022 SURVEY**

RECOSA conducted a survey of its members May 24, 2022 – Oct. 31, 2022. The survey included questions regarding benefits, brown

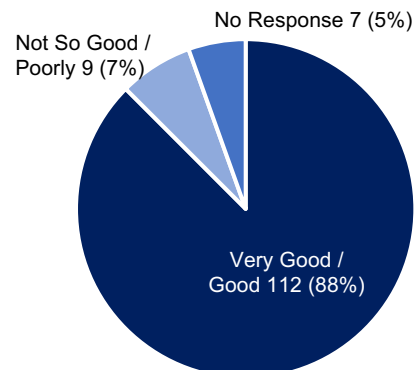
bag topics, and quality of life activities. 128 unique survey responses were received.

Following is a summary of the information garnered from the survey:

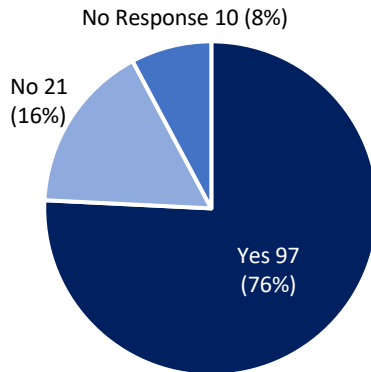
**Are you familiar with RECOSA?**



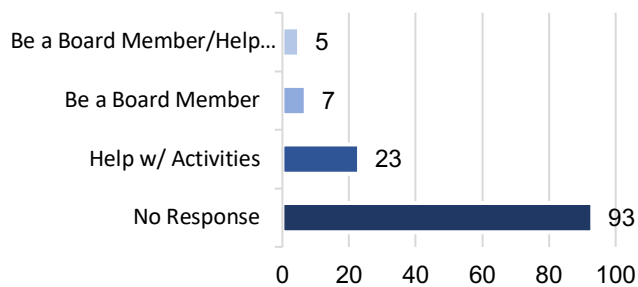
**How well RECOSA meeting mission overall?**



**Are you willing to attend online sessions?**



**Yes, I would be willing to:**



Survey respondents contributed many great ideas regarding benefits, Brown Bag topics, and quality of life activities.

Survey respondents had the following comments and suggestions regarding retiree benefits, which have been shared with the City of San Antonio's Human Resources Dept.:

- complicated retirement/separation process
- improve customer service by insurance providers
- confusing transition from non-Medicare (pre-65) to Medicare (post-65) coverage
- improve health plan options for retirees
- increase dental options and combined dental and health coverage
- additional mental health providers
- life insurance plan for which retirees qualify
- poor Medicare coverage administration
- include dental and/or hearing aid coverage in Medicare coverage
- increase annual enrollment time period
- update Medicare provider directory
- increase prescription cost and difficulty in obtaining brand drugs

Following is a word cloud of the comments regarding retiree benefits, with the most repeated words presented bigger and bolder:



At the Nov. 18, 2022, Brown Bag/Annual Membership Meeting, attendees participated in small group discussions to further define and rank the Brown Bag topics and quality of life activities identified in the survey.

Brown Bag topics, ranked by the attendees in order of interest, were:

1. health, exercise, nutrition, meditation, mental well-being, physical wellness, overcoming boredom and/or isolation
2. legal/financial issues, such as long-term care, reverse mortgages, living wills/trusts, property taxes, etc.
3. educational/recreational/informational opportunities, such as OASIS offerings, City of San Antonio and AARP programs, access to City of San Antonio facilities and activities, benefits available to active employees
4. volunteer opportunities for retirees
5. reemployment opportunities, other ways for retirees to make ends meet
6. hard decisions, such as stop driving, move to assisted living/memory care/nursing home, age in place or downsizing options, information about costs and

## statistical stays in Texas facilities and how to budget for these

7. general questions about Medicare, Medicare Advantage, Medicaid and hospice (how it works with health insurance, what is paid, covered)
8. digital literacy, including defenses against identity theft and scams targeting the elderly, digital couponing for cost savings, etc.
9. legislative issues affecting seniors, future of Social Security & Medicare, high cost of prescription drugs
10. "retiree 1-minute at the mic" for retirees to share how retirement life is for them

Quality of life activities, ranked by the attendees in order of interest, were:

1. annual family picnic
2. "sit & mingle" ice breakers
3. dancing
4. walks & hikes
5. exercise & nutrition
6. happy hours
7. visits to museums, parks, etc.
8. cooking & menu planning for individuals/couples

Following are word clouds of the comments regarding Brown Bag topics and quality of life activities, with the most repeated words presented bigger and bolder:

## Brown Bag Topics



## Quality of Life Activities



RECOSA would like to thank all members who participated in the 2022 Survey and to those who helped define and rank the recommendations at the Nov. 18, 2022, Brown Bag/Annual Membership Meeting. The board will use these recommendations for planning future Brown Bag sessions and quality of life activities.

**COORDINATION WITH CITY MANAGER'S  
OFFICE & HUMAN RESOURCES DEPT.**

RECOSA worked with the City of San Antonio's Human Resources Dept. and City Manager's Office throughout 2022 to address benefits, and retiree questions and concerns. This included:

- advocated on behalf of retirees on proposed 2023 insurance premiums – helping to ensure no increase for pre-65 retirees, as well as post-65 (Medicare) retirees hired before Oct. 1, 2007, with a small increase for those hired after that date
- clarified how the TMRS cost-of-living-adjustment (COLA) is calculated, which is 70% of the change in the previous year's Consumer Price Index (CPI), the maximum allowed by Texas state law – for 2023 the City of San Antonio approved a 4.9% COLA for retirees

- extended various event and other discounts and offers to retirees that were available to active employees
- participated in the City of San Antonio's evaluation committee for the selection of a new dental insurance provider – as of 2023 the new dental provider is Humana
- clarified Aetna Medicare's out-of-network and Extended Service Area coverage
- participated in the City of San Antonio's Pathway to Retirement to assist active employees with pre-retirement planning
- participated in the City of San Antonio's Annual Charitable Campaign
- shared feedback from RECOSA's survey regarding benefits
- discussed contracts with various health insurance providers (medical, dental, vision, etc.), their effective dates, and future RECOSA participation in evaluation committees for new providers

### **BOARD OUTREACH**

RECOSA was busy throughout 2022 conducting outreach to retirees through various mechanisms. Some of the highlights were:

- conducted monthly board meetings virtually via Zoom (except Apr. 2022) and several board work sessions – retirees are always welcome to attend board meetings
- assisted retirees with healthcare questions and issues in coordination with City of San Antonio's Human Resources Dept. and health insurance providers
- held three Brown Bag sessions in conjunction with the City of San Antonio:
  - ❖ Mar. 2, 2022 (via Cisco WebEx) – presentation by Bexar County Appraisal District (BCAD) management/staff on residential property appraisals and protests
  - ❖ Aug. 16, 2022 (in-person) – presentations by City of San Antonio's Management & Budget Dept. and Human Resources Dept. directors on the City of San Antonio's proposed budget and benefits respectively
  - ❖ Nov. 18, 2022 (in-person) – presentation and small group discussions on RECOSA survey in conjunction with Brown Bag/Annual Membership Meeting and board election

The primary method RECOSA communicates with retirees is via email. RECOSA limits

communications to email to avoid postage costs, since RECOSA relies solely on donations. RECOSA has maintained a "legacy" membership database of approximately 4,350 retirees for several years, but due to age few entries have email addresses, and the accuracy of the information cannot be verified. Therefore, RECOSA maintains an "active" membership database of approximately 1,069 retirees/email addresses, of which 108 new members were added in 2022. RECOSA encourages all retirees to regularly maintain their contact information by [clicking this link](#), or emailing us at [info.recosa@gmail.com](mailto:info.recosa@gmail.com).

### **ONLINE COMMUNICATION ENHANCEMENTS**

RECOSA continuously strives to provide its members and all retirees with timely and thorough communications regarding benefits and other information important to retirees. To this end, RECOSA maintains its website, [recosa.org](http://recosa.org), and continues to send group email campaigns to retirees via MailChimp.

For 2022, RECOSA:

- developed 38 email campaigns (2021: 30)
  - ❖ 1,027 avg. successful email deliveries per campaign (2021: 887)
  - ❖ 905 opened emails per campaign, 494 unique or 48% (2021: 826 opened emails per campaign, 351 unique or 39%)
  - ❖ How often subscribers open & click emails (all-time)
    - 49% Often
    - 14% Sometimes
    - 36% Rarely
- produced 41 website posts (2021: 50)
- generated 1,752 website visitors with 5,809 views (2021: 1,290 website visitors, 4,153 views)
  - ❖ Top five viewed RECOSA webpages (all-time):
    - Home/Archives
    - City Contact List/Retiree Resources
    - Aetna Healthy Rewards
    - 2022 Board Members
    - "Retiree Matters" Newsletters

**Major technological changes and enhancements in 2022 included:**

- updated the website banner to add new photos from Aug. 2022 Brown Bag session and Nov. 18, 2022, Brown Bag/Annual Membership Meeting
- created several photo galleries on the website
- added online donation functionality to the website
- created a webpage for retiree discounts and offers on the website
- created links to various presentations on the website
- created member survey in MailChimp with link on website
- added AARP newsfeed to website
- increased engagement via RECOSA's Facebook page, [facebook.com/recosa4u](https://facebook.com/recosa4u)

**FINANCIALS**

For the period Jan. 1, 2022 – Dec. 31, 2022, RECOSA had a net income of \$960. RECOSA's assets consist of checking and savings accounts held at Generations Federal Credit Union (GFCU). GFCU once again made the largest donation to RECOSA of \$4,000, earmarked for RECOSA's technology and Brown Bag/Annual Membership Meeting lunch costs. In addition, founding member George Whitfield continued to generously support RECOSA with his recurring monthly donations totaling \$300 for 2022.

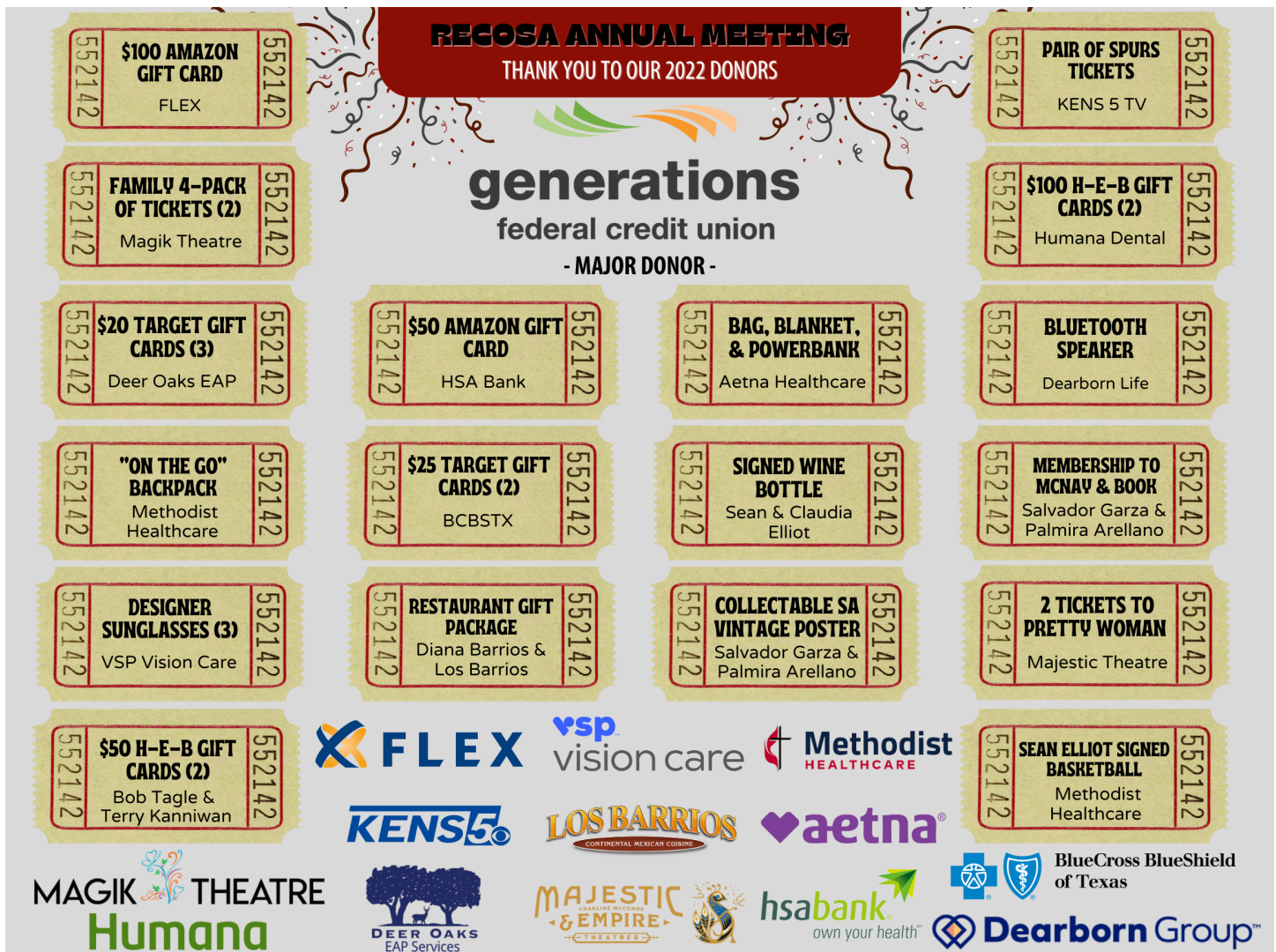
<b>FINANCIAL REPORT</b>			
Jan. 1, 2022 – Dec. 31, 2022			
BEGINNING BALANCE			\$16,387
INCOME			
Donations			
Generations Federal Credit Union	\$4,000		
Individual Member & Memorial Donations	\$603		
Recurring Monthly Donations	\$300		
Online Donations	\$305		
Total Donations		\$5,208	
Dividends		\$15	
TOTAL INCOME			\$5,223
EXPENSE			
Technology ( <i>website maintenance, software &amp; licenses</i> )		(\$3,110)	
Administrative ( <i>post office box rental &amp; postage, office supplies, printing, name tags &amp; certificates, novelties, etc.</i> )		(\$228)	
Annual Membership Meeting ( <i>general, food, supplies, door prizes</i> )		(\$925)	
TOTAL EXPENSE			(\$4,263)
ENDING BALANCE			\$17,347
NET INCOME / (EXPENSE)			\$960

**RECOSA ANNUAL MEMBERSHIP MEETING DOOR PRIZES**

RECOSA was again fortunate in 2022 to receive some 30 door prizes from over 15 generous donors to give away at the Nov. 18, 2022, Brown Bag/Annual Membership Meeting, which was held at the Pre-K 4 SA East Education Center.

The door prizes ranged from individual items to gift cards, some valued in excess of \$100. RECOSA appreciates the valuable assistance of Wanda Heard, City of San Antonio Asst. Human Resources Director, and Salvador Garza, newly elected RECOSA board member for 2023.

RECOSA would also like to thank the following donors for their door prizes:



## **ACKNOWLEDGEMENTS**

RECOSA's success in 2022 wouldn't have been possible without the support and assistance of the following:

- City of San Antonio Human Resources Dept. staff and the City Manager's Office
- Liz Garcia, 2022 Treasurer, and David Lopez, 2022 Recording Secretary – outgoing board members
- the family of Rose Rangel, former board member and chair, who passed away Nov. 20, 2021
- individuals and businesses who made generous contributions of funds and door prizes for the Nov. 18, 2022, Brown Bag/Annual Membership Meeting