



NEOEA -- Retired

A publication of the North Eastern Ohio Education Association -- <http://www.neoea.org/> -- <http://neoea-r.ohea.us/>
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Hank Haynes, Editor

STRS Election

By Mary Binegar, OEA-R Chairperson

OEA-R has endorsed **Rita Walters** and **Robert Stein** for re-election to the **STRS Ohio Board**. Both are very knowledgeable, hard-working and have made the tough decisions to make sure our pension and health care benefits are there for the long haul. Simply put, when it comes to the oversight of our retirement funds experience matters.

Rita Walters retired with 35 years of experience as a classroom teacher with Switzerland of Ohio Schools. As an active teacher she also served as president of her local association and on the OEA Board of Directors for 12 years. Walters was elected to the STRS Ohio Board in 2017. Robert Stein is a retired teacher from Strongsville City Schools and was also a Praxis III assessor with the Ohio Department of Education. Stein has served on the STRS Board since 2009.

Maintaining a strong retirement system is important to every retired member. We must do everything possible to re-elect Rita Walters and Bob Stein. OEA-R will be asking our members to help get the word out to other OEA-R members and to our friends who receive STRS benefits but are not OEA-R members.

Another important event quickly approaching is the OEA-R Spring Conference on March 30, 2021. For information about the conference and the registration form, please click on this link (<http://oea-r.ohea.us/events/spring-conference/>).

Thank you for all you do.

More STRS Election

We are approaching a crucial STRS election to reelect Rita Walters, and Bob Stein to the STRS Board. During April, STRS members will be able to vote online or request a paper ballot.

Rita and Bob have been diligent in making sure the STRS funds are secure into the future. Both Rita Walters and Bob Stein are up for reelection. Unlike their opponents, both Bob Stein and Rita Walters have extensive training and experience with the issues facing STRS. Please check their bios at: <https://www.bobstein.us/>.

The COLA is the big issue in this campaign. Bob and Rita have protected the stability of STRS and believe that providing a COLA now would jeopardize the stability of the STRS system. Read their statements below. Their opponents feel that a COLA should be restored now, unfortunately, they do not have the training or experience to understand that such action now could be disastrous to STRS.

Please read the following statement from Bob Stein --

I first ran for the STRS Ohio board in 2008. The Global Economic Downturn had severely damaged the system and I believed my experience in business and investments could benefit STRS Ohio and its retirees. I've continued to run for a retiree trustee seat since then because my service has measurably improved the long-term condition of the system as well as increase the probability that STRS Ohio retirees will recover what was lost in the pension reform following The Global Economic Downturn.

I was a board candidate in 2012 and 2016 to provide continuity to pension reform programs and to work to improve the STRS Healthcare Fund. My thought was that Healthcare inflation is much higher than broad inflation so progress made to slow the rise in healthcare costs would benefit retirees more quickly than if we waited to fix the pension system first. While the board continued its work on pension issues, it was able to move our healthcare fund from "we have maybe 10 years left" to "the healthcare fund is fully funded for 60 year rolling periods" by adjusting and executing a complex plan over most of the last decade. I was part of that from the beginning and I am sure we can do it with COLA and supplemental benefits as well.

Before I was elected in the 2008-9 election, I studied several board governance models and enhanced my understanding of institutional investment concepts. Personal investing, and even economics, are very different from making institutional investment policy. I've continued to update my training using professional publications and professional contacts made at conferences and seminars.

I have earned a Certificate of Achievement in Public Plan Policy (CAPPP) from The International Foundation for Employee Benefit Plans and attended workshops, conferences, investment seminars, and many distance courses related to service as a trustee of the State Teachers Retirement System of Ohio. In my first STRS Ohio Board term I served on the Trustee Education Committee for the National Council for Teacher Retirement.

My ongoing interaction with a global network of public service and pension professionals continues to produce policy and program ideas that benefit STRS Ohio. It is interesting that trustees of other pension systems, academic researchers, and the occasional international authority often seek the advice of STRS Ohio board members and staff regarding efforts to emulate the success of our policies and practices. They often ask "why can STRS Ohio make this work but we can't?" The answer is high quality professionals executing a proven governance model solely in pursuit of the Mission and Vision of the system.

My daily work involves following developments in the public pension

field and other industries using several daily newsfeeds. I share my comments on the weekly NCPERS newsletter with STRS retirees and members who have requested this by writing to my STRS email address.

Please read the following statement from Rita Walters --

When I ran for a retired seat on the Board the first time I said my goal for being elected to the STRS Ohio Board was to make sure that the fund was secure and that we can maintain the option of affordable healthcare for all future and current STRS retirees. At this time our healthcare fund is currently funded at 182%. The Board passed a motion at the October Board of Directors' Meeting to rebate \$250 to each retiree that was enrolled in STRS Healthcare on October 1, 2020. That money will be in the December 2020 benefit payment. It is tax free and it is due to a usage level that was below estimates and the rebates STRS received from the government exceeded expectations.

STRS Ohio just celebrated its first 100 years of existence. The fund has been paying benefits to Ohio teachers for many, many years. My goal is to make sure that can continue for the next 100 years. Our responsibility is to all members of STRS Ohio not just the retirees. Would I like to have my COLA restored? You bet your life I would but to ensure that both current retirees and future retirees continue to receive their monthly benefit month after month, year after year, I am willing to forego that for now until we can stabilize the fund. I realize that is not the position of all retirees.

I know there are people out there saying that we received a COLA when we weren't as well funded as we are now and that we received a 13th check when the funding level wasn't what it is now but things are a bit different now. The STRS Ohio fund is a very mature fund. STRS Ohio pays out about \$4 billion more in benefits annually than it receives in contributions each year. That is called negative cash flow. The difference is made up by investment gains. What happens if investment gains don't match assumptions? When investment returns do not meet assumptions, the asset level can drop due to negative cash flow. The pension fund needs to be able to weather years when market returns don't meet expectation. For example 2020 was one such year.

I know there are people who don't think the Board even thinks about the restoration of the COLA but they are wrong. We know that the retirees have been patient. We want to provide for them some inflation protection even if it isn't the COLA but that can only be done when it does not materially jeopardize the stability of the system. I am there for the good of the whole, not just the here and now but for the future of all STRS members. The stability of the system is paramount. We have 180,000 Active participants and 157,000 retirees. At one time we had several actives paying into the system for every retiree. That is no longer the case, due to the maturity of the system.

**OEA-R Spring Conference
Sponsored by NEOEA-R**

Save the date MARCH 30—Virtual Conference! You can join us in your PJs from the comfort of your own home. Check the insert flyer or download a PDF: <http://neoea-r.ohea.us/files/2020/03/RetiredSpringConf2021.pdf>.

SCHEDULE—Tuesday, March 30
Our conference will start at 9:00 a.m. with a few welcoming words and announcements. Then we'll begin our sessions:

- **Legislative Update** by OEA Vice President Jeff Wensing
- **STRS Update** by Tamla Cole OR SERS Q&A by Cameron Vaughn
- **NEA Member Benefits** by Guy Kendall-Freas
- **Author Talk** by three local authors: Casey Daniels/Kylie Logan, Susan Petrone, and D.M. Pulley

OEA Coronavirus FAQ

For more information: <https://www.ohea.org/oea-coronavirus-faq/>. The OEA webpage has a wealth of information divided in to sections:

- About the Statewide Closure;
- General Employee Questions;
- Licensed Employee Questions;
- Support Staff Questions;
- Initial Teacher Licensure Questions;
- Education Policy and Practice;
- Higher Education;
- School Finance;
- Student Issues;
- Early Childhood;
- Serving Students with Disabilities;
- Distance Education;
- Retirement Questions;
- Vaccination;
- Additional Resources.

Also find good information at: <https://coronavirus.ohio.gov/wps/portal/gov/covid-19/covid-19-vaccination-program>.

POP5 – Protect Our Pensions

Many members have again received a solicitation from an organization called Protect Our Pensions, also known as POP5. OEA and OEA Retired want you to know that while there does not appear to be any inherent conflict between the stated goals of POP5 and OEA, it is important to note that there is nothing that POP5 is seeking to accomplish that OEA and our allies are not already working on. Download the **POP5 – OEA Report**. Check this link from Bill Lavezzi -- <https://lavezzi.us/education/a-parliamentarian-looks-at-pop/>.

NEOEA-R Member News

by: Donna Smoot Walters, OEA-R Advisory Council NEOEA Representative

NEOEA Retired have been very busy during this past year of Covid-19. The **NEOEA Retired Organizing Committee** has been meeting virtually to continue working on behalf of NEOEA members. Several NEOEA-R members have gone above and beyond the call of duty considering the new “normal” virtual world we live in today.

Vice Chair of NEOEA-R Organizing Committee; Dennis Lewis was the presenter on NEOEA Day. Dennis's 3-hour workshop entitled, **“I Wish Someone Would Have Told Me...Get Financial Planning Answers Now”**. Dennis was very informative and gave practical steps for increasing wealth.

Beryl Burkle volunteered to be **NEOEA OEA-R Diversity RAA representative**. The **“Diversity” Read Across America** will be the theme used by OEA-R for our next adventure with NEOEA-R Read Across America. A grant was written to NEA and OEA-R received funds to buy each of our ten districts books on Diversity for children. The committee was formed and started working in June to plan this large endeavor. Phil Long, Vice Chair of the Advisory Council for OEA-R, held planning sessions on Zoom. They chose book titles from the list printed by NEA. NEOEA-R readers will be reading virtually to students when they get into RAA. Beryl

organized our NEOEA-R readers so they will be able to read and be taped for their book presentations. Beryl enjoys spreading her love of reading to all students in a fun way! Any questions, please email Beryl Burkle at berylburkle@gmail.com. Visit the NEA RAA Page: <https://www.readacrossamerica.org/>.

Beryl is also the **Mentorship Program** coordinator for NEOEA-R. She continued this school year with the **Kent State Education Association (KSEA)** President Sarah Parsh. The two arranged to virtually meet and arrange KSEA students. They matched 28 Mentees and 9 Mentors together. They were not able to go to campus or meet any other way in person because of Covid-19. Beryl encouraged the Mentors to support the mentee with their expertise and developed ways to keep them connected. Beryl and NEOEA-R Mentors were invited to KSEA final semester zoom meeting on November 9. They had an enthusiastic response from Mentees and Mentors at this their final virtual meeting of the semester. Many Mentors and Mentees got to see the real people they are working with. Beryl had one student that went home to Slovakia for the summer and wasn't allowed to come back to the states. She was very excited to have a Mentor!!! The student continues to take all classes online.

Retired NEOEA Executive Director Bill Lavezzi has successfully completed the five-part examination given by the **National Association of Parliamentarians** that is required for certification as a **Registered Parliamentarian**; Bill completed the five parts between July 2019 and March 2020. Bill was already in demand as a parliamentarian before receiving his RP credential. From 1978 to 1994, Bill served as the **NEOEA Representative Assembly parliamentarian**, and from 2004 to 2016 Bill served as parliamentarian to the **Ohio caucus at the NEA Representative Assembly**. Over the years he has presented workshops on parliamentary at training sponsored by NEOEA and OEA. The biggest advantage of his recent studies is a view of a broader picture. "One of the things you learn is that some of our practices are common to many organizations, while others are unique to NEA and its affiliates," he says. "It's interesting to see the different ways in which organizations implement the same parliamentary rules. Contact with the larger parliamentary community forces you to examine your

assumptions about why we do things the way we do."

Pat Frost Brooks, past OEA President, retired from her office but not her desire to help others. She volunteered at the **Kids Books Bank on NEOEA Day** with **Barb Armour** and another women from her ESP Local. They sorted several thousand books for all ages that will be distributed to children throughout NE Ohio. The book bank even placed books in the bag/boxes at food centers. Pat just completed six years as the **NEA's Elections Chair**. Of course this was the FIRST year of voting during the pandemic. Pat coordinated each step of the election process, which needed to be dissected as to the "how" in this new normal. In the month of October, Pat was the closing keynote speaker for the **2020 virtual OEA MLTP**. The theme was Educator Standing Up and Answering the Call. She spoke to the participants about their path to leadership and how are they going to answer the call in a leadership position. During the past Presidential election, Pat worked for **Cuyahoga County Board of Election** as a Rover. She got to see how the election process behind the scenes the nuts and bolts what makes it work. Pat then switched to help out in **GA's senate runoff election** by writing messages of encouragement to vote for Rev Warnock and Jon Ossoff. Outside of OEA, NEA, NEOEA Pat belongs to **The National Congress of Black Women Greater Cleveland Chapter**. Shirley Chisholm and Dr. C. Delores Tucker and other notable founders founded the organization in 1984. The Mission is to empower the black women and her family in Greater Cleveland through social and political development, education, community engagement and rebuilding socioeconomic opportunities. Pat said,

Yes, this year has been challenging. Most have found a new creative way of doing what they once did." Dennis, Beryl, Bill and Pat reflect a sample of what NEOEA Retired members continue to accomplish. "The only ones among you who will be really happy are those who have sought and found how to serve" Albert Schweitzer.

Editor's note—Congratulations to **Steven Mitchell, East Cleveland EA-R** on his new book – "I Can't Read, Oh! What Shall I Do?" More information as we get it.

OEA Legislative Watch

OEA Legislative Watch is the association's newsletter covering the legislation and policies that affect public education employees.

<https://www.ohea.org/get-involved/legislative-watch/>

Retirement System Updates

- STRS <https://www.strsoh.org/>
- SERS <https://www.ohsers.org/>
- PERS <https://www.opers.org/>

OEA Retirement Systems Updates can be found at: <https://www.ohea.org/resources/>

Need to Update Your Contact Information?

Update your OEA & NEOEA contact information at: 1-844-OEA-info (1 844 632 4636) or membership@ohea.org. Also online: <https://www.ohea.org/member-center/member-update-form/>

Miss Your News and Views?

Each issue of the *NEOEA News and Views* is available online at <http://neoea.org/>. First register at <http://neoea.org/register/> -- it's easy and free. Once registered, you'll have access to the Members-Only page, which has recent issues and member-only information for download.

NEA & OEA Discounts

- **NEA Member Benefits:** For questions call 1.800.637.4636 (toll free); <https://www.neamb.com/> .
- **NEA Discount Marketplace,** <https://www.neamb.com/products/nea-discount-marketplace>
- **OEA ACCESS,** <https://ohea.org/member-center/member-benefits/>.
- **NEOEA Member Benefits:** <https://neoea.org/resources/member-benefits/>



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NEOEA-R Organizing Committee:

- Nancy Wonson, Lakewood TA-R; Chairperson
- Dennis Lewis, Parma EA-R; Vice Chair
- Sherri Koncilja, Painesville City TA-R; Secretary
- Gary Hollow, Bristol-R; Past Chair
- Donna Smoot-Walters, Barberton EA-R; NEOEA Liaison & OEA-R NEOEA Representative
- Peg Ham, Lorain EA-R; OEA-R Secretary
- Barbara Catalano, Mayfield EA-R; OEA-R ESP Representative
- Hank Haynes, ACCESS-R; web/newsletter editor
- Debbie Bernauer, Brecksville-Broadview EA-R
- Rhonda Braylock, East Cleveland EA-R
- Marsh Buckley, Mentor TA-R
- Beryl Burkle, Bedford EA-R
- Dave Ciborek, Twinsburg EA-R
- Nanci DiBianca, Cuyahoga Hts. TA-R
- Carol Dolgosh, Lakewood TA-R
- Martha Dunford, Perry EA-R
- Sue Fatica, Painesville City TA-R
- Marti Franks, Twinsburg EA-R
- Patricia Frost-Brooks, East Cleveland EA-R
- Martha Harper, Ashtabula ACSE-R
- Norman Hillstrom, Mentor TA-R
- Joyce Hives, East Cleveland EA-R
- Mary Keefe, Maple Hts. TA-R
- Bill Lavezzi, Aurora EA-R
- Adele Matias, Mayfield EA-R
- Steven Mitchell, East Cleveland EA-R
- Pat Waggar, Mayfield EA-R
- Jene Wilson, ACCESS-R
- Beverly Woolridge, Akron ACP-R

NEOEA Discounts

Check the NEOEA.org website for complete information on these valuable discounts. Visit <http://neoea.org/resources/member-benefits/>.

- **Bedrooms Today:** : <http://www.neoea.org/2019-01-BedroomsToday.pdf>.
- **Best Benefits Club:** <https://bestbenefitsclub.com/>. Use activation code **NEOEA0613** and company name **NEOEA**.
- **Bright Now! Dental:** <http://www.brightnowdental.com/>.
- **Liberty Mutual:** https://www.libertymutual.com/neoea?src=aff_4wpb_m_0006967_neoea.
- **Ohio Educational Credit Union:** <http://www.neoea.org/ohecu-loan.pdf>
- **Park Place:** <https://www.neoea.org/ParkPlace.pdf> (discount airport parking):
- **Great Lakes Science Center:** <http://greatscience.com/educators>.

OEA-Retired on the Web

OEA-R has a new presence on the OEA website at: <https://www.ohea.org/retired/>. If you get lost, pull down the "MEMBER CENTER" tab and click on "OEA Divisions, Affiliated Departments and Associate Organizations", then "Divisions", then "OEA-Retired".

On the page is a link to the original OEA-R website containing all the essential OEA-R information <http://oea-r.ohea.us/>.

OEA FUND FOR CHILDREN AND PUBLIC EDUCATION

Help raise money to elect pro-senior, pro-union, pro-education candidates. It's quick and easy to donate electronically.

Go to: <https://www.ohea.org/> and click on the DONATE button at the top of the page or click here: <https://www.ohea.org/donate/>

NEOEA Calendar

- March** Read Across America
- Mar 6** NEOEA Megaconference
- Mar 30** NEOEA Retired Spring Conference, Zoom
- Mar 30** NEOEA Retired Organizing Committee, Zoom
- Apr 17** NEOEA Representative Assembly
- May 6** OEA-Retired Delegate Assembly
- May 7-8** OEA Representative Assembly
- June 5** Ohio NEA Delegate Briefing
- June 22-24** OEA Summer Academy
- July 3-6** NEA Annual Meeting, Denver, CO
- July 21-22** NEOEA Summer Leadership Conference

