



NEOEAE -- Retired

A publication of the North Eastern Ohio Education Association -- <http://www.neoea.org/> -- <http://neoea-r.ohea.us/>
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Volume 21, Number 3

January 2021

Hank Haynes, Editor

OEA-Retired Election Results

OEA-R delegates were elected during October by online and mail-in ballot.

Delegates attend both the Fall and Spring OEA Representative Assemblies. On the day before, the OEA-R Delegate Assembly meets to carry out the business of OEA Retired and for a briefing with the OEA officers and reports from the OEA-R Advisory Council. Delegates from NEOEA also attend the Fall and Spring NEOEA RAs.

OEA-R members elected 27 Delegates to the OEA Representative Assembly from a field of 31 candidates. The 18 OEA-Retired Advisory Council members are automatic delegates by virtue of office, for a delegation of 45 delegates and 4 alternates by order of votes.

Here are the delegates from NEOEA by order of votes: **William A. Dorsey, Marsh Buckley, Nancy Wonson, Bill Lavezzi, Nanci J. DiBianca, Marti Franks, Debbie Bernauer, Hank Haynes, Jene Wilson, Norm Hillstrom, Steven Mitchell, Cheryl W. Hill, Diallys York.** Elected as an alternate: **Lyn Curry-Huston.** Delegates from NEOEA serving on the OEA R Advisory Council: **Peg Ham, Secretary; Donna Smoot-Walters, NEOEA Representative; Beverly Woolridge, At-Large Representative; Barbara Catalano, ESP Representative.**

NEOEAE Representative Assembly was held virtually on November 7. The following Delegates from NEOEA were in attendance: Debra Bernauer, Marshall Buckley, Barbara Catalano, Nanci DiBianca, William Dorsey, Martha Franks, Margaret Ham, Robert Haynes, William Lavezzi, Steven Mitchell, Donna Smoot-Walters, Jené Wilson, Nancy Wonson,

The OEA Representative Assembly was held virtually on December 5, 2020. The following Delegates from NEOEA were in attendance: Debra Bernauer, Marshall Buckley, Barbara Catalano, Nanci DiBianca, William Dorsey, Martha Franks, Margaret Ham, Robert Haynes, Norman Hillstrom, William Lavezzi, Steven Mitchell, Donna Smoot-Walters, Jené Wilson, Nancy Wonson, Beverly Woolridge, and Diallys York. The OEA-R delegates also met virtually the day before the OEA RA.

Please check for meeting summaries and minutes of the OEA-R Advisory Council, OEA-R Delegate Assembly, and the OEA Board of Directors on the Documents/Reports page of the OEA-R website at <http://oea-r.ohea.us/>.

STRS Election

by Nancy Wonson, Chairperson, NEOEA-R Organizing Committee

We are approaching a crucial STRS election to reelect Rita Walters, one of our OEA-R members, to the STRS Board. Rita has been diligent in making sure the STRS funds are secure into the future. Both Rita Walters and Bob Stein are up for reelection. In order for their names to appear on the ballot, we need to secure 500 signatures for each candidate.

Due to the current pandemic, it will be very difficult to circulate petitions in our usual manor. We are asking each member to sign a petition - and mail it directly to Rita Walters (and/or Bob Stein). The address is printed at the top of each petition.

We all know the advocacy of Rita Walters, and you can read the details in a letter from Mary Binegar, OEA Retired Chairperson. -- [letter about the STRS election](#)

Petition for Rita Walters

Petition for Robert Stein

Keep in mind the petitions may be duplicated as needed in case you are in contact with retired colleagues who are part of STRS.

Thank you in advance for helping to make sure Rita Walters, our fellow OEA-R member, is on the ballot for reelection. If you are also able to sign and/or circulate a petition for Bob Stein, we appreciate your efforts.

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.

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/>

OEA Coronavirus FAQ

For more information: <https://www.ohea.org/ohea-coronavirus-faq/>

OEA Advisory Council Report

by Donna Smoot Walters, NEOEA-R Advisory Council Representative

I hope you are staying safe and healthy. OEA -R has been busy navigating in this new virtual world. We continue to hold our regular Advisory Council meetings on Zoom. The OEA-R website has a new look! Check out our new website www.ohea.org/retired/ there is important information waiting for you! Our Read Across America Program is to be "virtual" this school year. OEA-R is seeking volunteers to read books to children. Todd Jaeck, our OEA staff liaison, will conduct the training on January 27th from 11-12. Volunteers have to be willing to record on their phones. If you would like to sign up for the training contact Beryl Burkle, berylburkle@gmail.com. Beryl is NE-R's coordinator for Read Across America OEA-R.

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. More information to follow! Watch for email updates!

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/>

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/>

SECURE and CARES Act Provisions for Retirees

by Dennis Lewis, NEOEA Personal Welfare and Financial Planning Committee

Two Federal laws enacted this year to respond to the pandemic have several impacts on the treatment of retirement accounts.

RMD Changes - The beginning date for Required Minimum Distributions from traditional IRA, 403b and 457b accounts has increased to age 72 for persons who turn 70 ½ on or after January 1, 2020. There is no change in the beginning age for persons who already were impacted by the age 70 ½ rule. However, the law suspends the RMD requirement for all persons in 2020 as the distribution will not be applied to income subject to taxation.

Stretch IRA Elimination – Inherited Traditional and Roth IRAs must have all assets redeemed within 10 years of the death of the IRA owner, rather than having distributions occur over the life of the non-spouse beneficiary. There are exceptions to rule to include a surviving spouse, minor children and certain other beneficiaries with disabilities or who are less than 10 years younger than the owner of the IRA.

Charitable Deductions – Persons may take a \$300 Charitable deduction in 2020 that reduces Adjusted Gross Income, even if the standard deduction is used. Qualified Charitable Deductions may still be taken at age 70 ½, although taking one will not have an impact on 2020 taxes.

Sources: Oakmark Funds, Morningstar and American Association of Individual Investors.

OEA-R Mentorship Program

by Beryl Burkle, NEOEA-R Organizing Committee

The Mentorship Program (retired teachers) continues this school year with the Kent State Education Association (KSEA). President Sarah Parsh and Beryl Burkle, Mentor arranged to virtually meet and arrange KSEA students. We arranged 28 Mentees and 9 Mentors together by September 30th. We will

not be going to campus or any other way to meet them in person, but we will support them with our expertise to keep them connected.

KSEA meetings are virtual meetings and Mentors were invited to their final semester meeting on November 9. We had an enthusiastic response from Mentees and Mentors at this their final virtual meeting of the semester. They were raising money for The Akron Children's Hospital and they had a terrific speaker that showed them how to connect with and teach students online. Those students that are doing student teaching were very glad to have this presentation. Many Mentors and Mentees got to see the real people they are working with.

They were all going home for Thanksgiving and taking finals online. Kent has not decided what the next semester will be but they are happy to have Mentors as their professional friends. We had one student that went home to Slovakia for the summer and wasn't allowed to come back to the states. She is very excited to have a Mentor! She continues to take all classes online.

Read Across America

by Beryl Burkle, NEOEA-R Organizing Committee

Celebrate Diversity will be the theme used by OEA-R for our next adventure with 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 OEA-R Advisory Council, has held planning sessions on Zoom. We have chosen book titles from the list printed by NEA. We will probably be reading virtually to students when we get into RAA activities in March.

Our NEOEA-R readers will be able to read and be taped for their book presentations. This program will start as soon as we are able to make it workable for retired teachers to participate. The pandemic will keep us out of schools until everything is safe. We as a group must remain patient and flexible. We will support this program with some of our retired members that have participated in Read Across America for up to ten years.

The OEA-R committee in Columbus has been assured that we are a very strong, resourceful and enthusiastic group of retired members. We enjoy spreading our 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/>.

OEA Board of Directors Report

By Carol Kinsey OEA-R BOD Representative

In the reports below you will note OEA made endorsements for candidates for both STRS and SERS Boards for the elections scheduled for Spring 2021. OEA-R member Judy Novak was a member of the 5 person screening committee for STRS. Endorsements were made for both retirement seats on the STRS Board. OEA-R members Barbara Catalano and Cindy Endres were members of the 5 person SERS screening committee. There is an endorsement for the retirement seat on the SERS Board. Also OEA-R member Sam Radel was appointed to a 7 year term on the OEA Appeals Board by the Representative Assembly. Active member Phil Hayes who won the top \$500 FCPE Giveaway amount very generously donated it back to OEA FCPE.

Former Executive Director Sheryl Mathis is retiring December 31 and relocating in Colorado to be near family. Newly hired Executive Director Patricia Collins Murdock assumed that position on December 1.

Whatever it is that you and your family celebrate at this time of year my wish for you is that you all are safe and healthy and find positive ways to share this season.

As always if you have any questions or concerns do not hesitate to contact me at Cskinsey@aol.com or 330-495-2318.

OEA Board of Directors December 3, 2020 – Via Zoom SUMMARY OF ACTIONS

1. Seated the following alternates at this meeting: Julie Nelson representing ECOEA-1, and Mike Fortman representing SWOEA-3.
2. Approved the President's recommendations:

- The appointment of Ellen Giovinazzo, representing Rural Caucus, effective immediately, to the Collective Bargaining and Member Advocacy Standing Committee, with a term ending July 14, 2023.
- Accepted the resignation of Kory Everhart, representing NCOEA, effective immediately, from the Convention Planning Standing Committee, leaving a vacancy with an unexpired term ending July 14, 2021.
- Accepted the resignation of Sean McCullough, representing Central OEA/NEA, effective immediately, from the Legislative Standing Committee, leaving a vacancy with an unexpired term ending July 14, 2023.
- The appointment of the following to the Legislative Standing Committee:
 - Cynthia Jones, representing WOE, effective immediately, with a term ending July 14, 2021.
 - Kristin Jones, representing Rural Caucus, effective immediately, with a term ending July 14, 2023.
- The appointment of Kimberly Barnhart, representing WOE, effective immediately, to the Local Development and Training Standing Committee with a term ending July 14, 2022.
- Accepted the resignation of Kimberly Burrus, representing WOE, effective immediately, from the Professional Efficacy Standing Committee, with an unexpired term ending July 14, 2021.
- The appointment of *Jovita Wade, representing WOE, to the Professional Efficacy Standing Committee, effective upon receipt of acceptance, with a term ending July 14, 2021.
- The appointment of the following to the OEA Resolutions Standing Committee:
 - *Melissa Collins, representing Central OEA/NEA, effective upon receipt of acceptance, with a term ending July 14, 2022.
 - Jeanne Cerniglia, representing Rural Caucus, effective immediately, with a term ending July 14, 2023.
- 3. Accepted the financial reports for October 31, 2020.
- 4. Approved the Executive Director's recommendation for hire of the UniServ Political Advocacy Consultant, Troy (Grand Old River Leadership Council).
- 5. Unanimously adopted OEA's Position Statement on Putting Education First in



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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 Wagar, Mayfield EA-R
- Jene Wilson, ACCESS-R
- Beverly Woolridge, Akron ACP-R

Regard to Containing the COVID-19 Pandemic.

6. Adopted a New Business Item to Increase OEA ESP At-Large Board of Directors Positions.
 7. Accepted the Audit Committee Report.
 8. Endorsed Carol Correthers for an active member seat on the STRS Board of Directors.
 9. Endorsed the following for retired member seats on the STRS Board of Directors:
 - Rita Walters
 - Robert Stein
 10. Endorsed Barbra Phillips for an active member seat on the SERS Board of Directors.
 11. Endorsed Frank Weglarz for a retired member seat on the SERS Board of Directors.
- Informational: The Board of Directors kicked off the annual OEA Fund for Children and Public Education drive at the meeting with contributions totaling \$2,606.00.

**OEA Representative Assembly
December 5, 2020 – Via Zoom
SUMMARY OF ACTIONS**

1. Adopted the proposed 2020-2021 Legislative Policies for Achieving Excellence in Education.
 2. Approved the appointment of Sam Radel to the OEA Appeals Board for a seven-year term ending August 31, 2027.
- Adopted the proposed 2020-2021 Resolutions Report.
- Informational:
- 752 delegates registered to participate; 677 delegates participated in the assembly.
 - Delegates contributed \$20,967.00 to the OEA Fund for Children and Public Education.
 - FCPE giveaway winners:
 - o \$500 – Phil Hayes (Columbus Education Assoc.)
 - o \$300 – John Bartos (Pickerington Education Assoc.)
 - o \$100 – Loni Goodballet-Ross (East Liverpool Education Assoc.)
 - The following Constitution articles were read by title for amendment at the May 2021 RA: Article V – Board of Directors; Article VI – Officers; Article IX – Affiliates; Article X – Amendment to the Constitution and Bylaws; Article XI – Indemnification.

NEOEA Calendar

- Jan 30** NEOEA ESP Virtual Conference
- Feb 9** NEOEA Retired Organizing Committee, Zoom
- Feb 22** NEOEA Listen and Learn Legislative Panel
- Feb 27** OASNP Special Education Virtual Conference
- 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
- 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 21-22** NEOEA Summer Leadership Conference