



# NEOE -- Retired

A publication of the North Eastern Ohio Education Association -- [www.neoea.org](http://www.neoea.org) -- [retired@neoea.org](mailto:retired@neoea.org)  
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Hank Haynes, Editor

## STRS Board Elections

The STRS Board election will be conducted throughout the month of April 2009. One active member and two retirees will be elected to the Board. The OEA Board of Directors voted to endorse **Jim McGreevy**, a retired teacher from Zanesville, and **David Preslan**, a retired teacher from Bowling Green, for the two retiree seats on the Board. Additionally, the Board of Directors endorsed **Carol Correthers**, a teacher with the Lorain Education Association, for the active seat.

**McGreevy** is a consistent attendee at STRS Ohio Board meetings who authors the OEA online STRS Ohio report and has completed OEA-sponsored training for Board members to receive the International Foundation of Employee Benefit Plan's Certificate of Achievement in Public Plan Policy (CAPPP) in both health care and pensions. He currently serves on the OEA Board of Directors representing retirees.

**Preslan** taught Industrial Technology in the Toledo Public Schools and is a lifetime member of the Ohio Federation of Teachers (OFT). He has served on the Board of Directors for the Toledo Public Schools Credit Union. He is extremely interested in health care issues and serves as a STRS Health Care Advocate.

All of OEA's endorsed candidates are committed to protecting pension benefits and access to affordable health care for current and future retirees. They are actively engaged in rigorous training on pension and health care issues to better prepare them for the important responsibility of being a member of the STRS Board.

## 2009 Educator Lobby Days

The OEA has announced that **March 10, April 28, and May 12, 2009**, have been set as Educator Lobby Days. Educator Lobby Days provide an opportunity for OEA members to meet with state legislators to discuss key educational issues. In an effort to broaden support for public education issues and build partnerships, we have invited education partners including administrators, school board members, students, and parents to join our lobby day efforts. OEA-Retired members are urged to participate to lobby for great public schools. Also, there are issues affecting your retirement and benefits that need to be addressed at that time.

Please join your OEA colleagues at the OEA Headquarters Media Center, 225 E. Broad Street in Columbus, Ohio, at 9 a.m. for an hour-long briefing. We strongly encourage you to schedule your meetings with your legislators prior to the lobby day you plan to attend. If you need further information or would like to attend Educator Lobby Days, please contact Jada Wilson at [wilsonja@ohea.org](mailto:wilsonja@ohea.org) or 1-800-282-1500.

**The OEA Legislative Reception, May 12, 5:00 p.m.-7:30 p.m., will be held at the Ohio Theatre Pavilion.** If you need further information or would like to attend the OEA Legislative Reception, please contact **Briana McKay** at [mckayb@ohea.org](mailto:mckayb@ohea.org) or 1-800-282-1500.

## OEA – Retired Elections

Ballots have been sent out for election of OEA-R Vice President and six NEA-R Delegates.

Running for OEA-R Vice President is **John Hoyes** from EOE and **Nancy Wonson** from NEOEA. **David Bowen** was unopposed for President, and **Marti Huss** was unopposed for Secretary. Both were elected by acclamation.

Six delegates from a field of 50 will be chosen by all members to represent OEA-R at the NEA-R Annual Meeting and serve as retired delegates to the NEA Representative Assembly.

All members will receive an officer ballot and an NEA-Retired delegate ballot. Please follow the directions carefully and return your ballots to OEA by the third week of March.

## NEOE Representative Assembly Endorses Nancy Wonson for OEA-R VP

**Nancy Wonson** is proudly serving NEOEA and needs your support with your vote for OEA-R Vice President in the election this month.

Nancy pledges to bring OEA-R to you the members by:

- Developing programs that meet members' interests and needs and bringing meaningful workshops to the members.
- Continuing to increase communication by bringing issues and information to members in a timely manner.
- Increasing the Intergenerational Mentoring Program on college campuses to bring together retired members and education students.
- Work to increase membership by making organizing tools available to assist the districts/chapters.



## NEOEA-R Screening Committee Report

By Gary Hollow, NEOEA-R Chair

The NEOEA-R Organizing Committee developed a pilot screening project to inform NEOEA retirees regarding the OEA-R Advisory Council Officer election. Candidates were sent a nine question survey. The Retired Organizing Committee then held a teleconference to review the candidate questionnaires. The final decision was taken to the NEOEA Board of Directors for final approval.

The NEOEA-R Organizing Committee and the Fall NEOEA RA voted to recommend **Nancy Wonson** for the position of Vice President. All candidates submitted their questionnaires. David Bowen, running for re-election as President, and Marti Huss, running for Secretary, had no opposition and each have been elected by acclamation.

**David Bowen** has organized workshops, is getting OEA District newsletters started, and is encouraging members to attend the NEA East Regional Conference. He is working to find ways for retired members to serve OEA and increase membership at the district level.

**Marti Huss** believes communication is the key to success and promises to work to share successful ideas in other OEA Districts. She wants to find the financial support for those Districts that have not yet created a retired committee.

## OEA Endorsed Candidates to Serve on SERS Board

The three OEA endorsed candidates for the SERS Board were the only ones to qualify for the ballot, so there was no need to hold an election. All were elected by acclamation.

**Beverly Woolridge**, an administrative secretary with the Akron Public Schools, will be one of the first OEA members to serve in this capacity. Current board members **Barbara Phillips**, a bus driver from Ashland, and **Mary Ann Howell**, a retiree who served as an account clerk with Columbus City Schools, were re-elected to their second terms on the Board.

## Pay Now? Pay Later? Federal Stimulus Plan Impacts Active and Retired Members

by Bill Lavezzi, NEOEA Executive Director

Since some members of NEOEA have families that include both working and retired members, we're providing information here that applies to both groups.

Many of our members have heard about the "Making Work Pay" tax credit for working individuals and families. This credit (which will provide up to \$400 for individuals and up to \$800 for families in 2009 and 2010) is being implemented through a change in the tax withholding tables.

According to Terri Bierdeman, head of STRS's Governmental Relations Department, "pension plan distributions are not considered to be 'earned income' for purposes of qualifying for this new credit. However, the Department of the Treasury issued new tax withholding tables to reflect the Making Work Pay credit and other changes resulting from the stimulus package and told pension plans [like PERS, SERS, and STRS] to use the new tables." *Barring a change, then, some retired members may find themselves with tax due at the end of the year since their withholding will have been adjusted for a credit they can't take.*

In addition, the federal stimulus plan includes a one-time \$250 payment to Social Security recipients, which they should receive by late May. STRS's Bierdeman tells us that "initially, this benefit would not have been available to public employees who were not covered by Social Security. However, during the conference on the legislation, Senator John Kerry and others succeeded in adding a section providing a one-time refundable tax credit of \$250 in 2009 for such non-covered public retirees (\$500 in the case of a joint return where both spouses are eligible). Any such credit must be deducted from any allowable 'Making Work Pay' credit."

Obviously these changes are intended to put more money in members' hands, but they can have some impact on members' tax liability. NEOEA does not provide tax advice, so members (both retired and active) are advised to consult a tax professional with any questions on the impact of these provisions.

## Social Security GPO/WEP Introduced

Senator Feinstein (D-CA) and Senator Collins (R-ME) have reintroduced S-484 which is the Senate version of the Social Security Fairness Act that would repeal the Government Pension Offset Provision (GPO) and Windfall Provision and Elimination Provision (WEP). The Senate has 11 bipartisan cosponsors. Additionally, an identical bill, HR-235, was introduced in the House of Representatives in January. The House Bill has 181 bipartisan cosponsors.

OEA will continue to circulate **petitions** in support of repeal. Ohio citizens who signed the petitions during the last legislative session should re-sign the petition this year. One other helpful activity would be personal stories to our Ohio Senators. If you have a friend or relative or if you have been or will be harmed by the offset or windfall provisions, tell your story to your Senators and urge them to vote for the repeal of these provisions. Real life stories have a real impact on political leaders.

Urge Congress to:

- Pass the Social Security Fairness Act (HR-235 and S-484)
- Remove the unfair offset that takes away earned benefits from retired public employees who have earned social security benefits
- Continuation of GPO/WEP discourages talented people from entering the teaching profession
- Move the Social Security Fairness Act forward for a vote

Go to the NEA Legislative Action Center at [www.nea.org/home/LegislativeActionCenter.html](http://www.nea.org/home/LegislativeActionCenter.html) for more information and a sample letter for your Senators.

## Does Your Local Have a Retired Group?

The NEOEA-R Organizing Committee would like to connect with local retired groups. Does your local have an organized retired group or a representative to your Executive Committee or Board of Directors? Please send contact information to [retired@neoea.org](mailto:retired@neoea.org).

### Come Celebrate the Season at the 2009 Spring Regional OEA Retired Conference

The 2009 Spring OEA-R Regional Conference will be held Wednesday, May 20, 2009, at the Rothschild Farm in Urbana, Ohio. This conference is sponsored by OEA-R, OEA Region I, Capital-Retired, and Central OEA/NEA-Retired.

Speakers and presentations by:

- David Bowen, OEA-Retired President
- John Hoyes, OEA-R Vice President
- Pat Frost-Books, OEA President
- Bill Leibensperger, OEA Vice President
- Jim Timlin, OEA Secretary-Treasurer
- Larry Wicks, OEA Executive Director
- Laura Ecklar, STRS
- Guy Kendall-Freas "25 Financial Mistakes You Can't Afford to Make"
- Roger Corey "Managing Your Money in Difficult Times"

Registration and breakfast begins at 9:30 a.m., with speakers and programs to begin at 10:00 a.m. Lunch will be served. A garden tour is planned after lunch. The Conference will end at 3:00. Door prizes and a 50-50 raffle will be a part of the program. **The registration deadline is Friday, May 8, 2009.** There is a limit of 90 participants.

Enclose a check for \$20.00 payable to the Ohio Education Association along with Name, Address, City, State, ZIP, and E-mail to guarantee your spot and mail to:

**Spring Statewide Conference  
c/o Don Holub  
Ohio Education Association  
225 E. Broad Street Box 2550  
Columbus, Ohio 43216**

Indicate if you want to participate in the garden tour. You will be notified by email or letter when your reservation is received.

### IX Indoor Amusement Park Tickets Available

Join us at the **IX Indoor Amusement Park** for Ohio's #1 Family Springtime Event—the Official Cure for Cabin Fever! Spanning over 20 acres, it's packed with over 150 rides, games, and attractions for guests of all ages. The

sponsors indicate that this year's event will highlight family fun and live animal shows, including Lou Mack's High Performance Trick Dog Thrill Show. This "ultimate dog show" features world champion trick performing dogs catching Frisbees and jumping into a 15,000-gallon pool. Also in the line-up are La Fiesta Latina, Ohio Sportsfest, Dora & Diego, Scooby-Doo, and The Fairly Odd Parents.

NEOEA's group buying power enables us to arrange **discounted tickets** for our members attending this event. Purchase regular \$19.00 tickets for \$15.00. The deadline for orders is Friday, March 20. Please allow two weeks for delivery. Go to the NEOEA website for tickets.

### New York, New York

Although NEOEA Day (October 16, 2009) seems like a long way off, it will be here before you know it. If you want to be guaranteed tickets for a musical in New York City, now is the time to make your reservation.

The **New York City tour**, October 15-18, 2009, includes: one night's lodging in Pennsylvania, two night's lodging in New York City, a ticket for one Broadway Show ("West Side Story," "9 to 5," "In the Heights," or "Jersey Boys"), a guided city tour, admissions for the Empire State Building, and dinner on the way home in Pennsylvania. Dinner in New York is optional at the cost of the meal and will be at Carmine's on Broadway and 90th Street or Da Rosina Ristorante on 46th Street in Midtown. Also available is a side trip to the Statute of Liberty and Ellis Island.

### Italy or Alaska this Summer?

Go to the NEOEA website ([www.neoea.org](http://www.neoea.org)) and click under International Travel or go to [www.neoea.org/InterTravel\\_2009.pdf](http://www.neoea.org/InterTravel_2009.pdf).

Learn about our sponsored trip to Italy in June 2009 and Alaska in August 2009. Find out about earning graduate credit and take advantage of potential tax write-offs when you travel for professional development.

Please call 216/518-0200 if you need more information.

### Chicago Tour--Baseball and the Roaring 20's

Our tour to **Chicago**, June 18-20, 2009, includes two nights' lodging in downtown Chicago, tickets to the Cleveland Indians vs. Chicago Cubs at Wrigley Field, two continental breakfasts at our hotel, and dinner at Tommy Gun's Garage (an audience interactive "speakeasy," which offers a Roaring 20's Musical Comedy Revue with da Gangsters, da Flappers, and you).

The package also includes a guided city tour through Prohibition-era Chicago with Untouchable Tours to see the gangster "hot spots" and "hideouts" made famous by Al Capone, his allies and his enemies, a narrated cruise of the Chicago River and Lake Michigan, and a tour of the Notre Dame Campus along with free time to do as you wish on Friday evening. This package is being made available by 20th Century Tours.

### Honeybaked Ham Gift Certificates

NEOEA's membership in Best Benefits Club permits members to buy **Honeybaked Ham** gift certificates and save 12%. Send the **form** with your check payable to NEOEA and receive your certificate(s) to use at the Honeybaked Ham store of your choice. Five gift certificate denominations are available:

- \$25.00 gift certificates for \$22.00
- \$30.00 gift certificates for \$26.40
- \$35.00 gift certificates for \$30.80
- \$40.00 gift certificates for \$35.20
- \$50.00 gift certificates for \$44.00

You may order as many **Honeybaked Ham** certificates as you wish. Only mail orders with checks are accepted: no credit card or telephone orders. NEOEA will not be responsible for lost or stolen certificates, and no refunds will be made. Allow 2-3 weeks for delivery. Order forms and payments must be received by Friday, March 27. Go to the NEOEA website for forms. NEOEA will assess a \$15 charge for checks returned due to insufficient funds.



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- Patricia Sharkey

**Editorial Board:**

- Hank Haynes
- Gary Hollow
- Bill Lavezzi
- Nancy Wonson

**Reports on the OEA-R Web Page**

Keep informed. Visit the OEA-R website to read the following reports: Go to the OEA site [www.ohea.org](http://www.ohea.org), then click on "OEA-R" along the left side.

- OEA Retired Spring Regional Conference, May 20, 2009 - Robert Rohschild Farm, Urbana
- OEA-R *Newsline* Winter 2009
- OEA-R ESP Report March 3, 2009
- OEA Board of Directors Meeting February 21, 2009
- STRS Meetings February 2009
- OEA Retirement Systems Update February 2009
- NEA Board of Directors Meeting February 2009
- STRS Board Meeting January 2009
- OEA Retirement Systems Update January 2009
- OEA Board of Directors meeting January 18, 2009.
- STRS Meetings December 2008
- OEA-Retired Caucus Meeting December 2008

- NEA Board of Directors Meeting December 2008
- OEA Board of Directors and OEA Representative Assembly report December 2008.
- OEA Retirement Systems Update December 2008
- OEA-R *Newsline* Fall 2008
- OEA Fall Conference Features Volunteering and OEA Campaign 2008
- NEA-Retired Advisory Council Minutes September 2008
- 2008 NEA-Retired Annual Meeting June/ July 2008 Washington, DC
- Reemployed Retiree Health Care Changes, Effective January 1, 2009
- Retirement Links

**Get Your  
 NEOEA News & Views at  
[www.neoea.org](http://www.neoea.org)**

**NEOEA Calendar**

- March 28** NEOEA RA, 9:00 a.m., Mayfield HS
- March 31** NEA-R Western Regional, Portland, OR
- April 2**
- April - May 4** STRS Board Election by mail
- April 7-9** NEA-R Eastern Regional, Savannah, GA
- April 28** Health Care Summit, Clarion Inn, Hudson
- May 8-9** OEA RA, 9:00 a.m., Columbus
- May 20** OEA-R Spring Conference, sponsored by Capital and Central OEA Districts, Rothschild Farm, Urbana
- May 30** NEOEA All-Committee Conference, 9:30 a.m., NEOEA Headquarters
- June 6** NEA Delegate Briefing, 9:00 a.m., Columbus
- July 1-6** NEA Representative Assembly, San Diego, CA
- July 22-23** NEOEA Summer Leadership Conference, Lakeland Community College