

## Retirement Systems Update

**2013 Annual Financial Statement Audit Completed** At the December meeting of the State Teachers Retirement Board, Clifton, Larson, Allen reported the results of its audit of the STRS Ohio financial statements for the fiscal year ended June 30, 2013. The report declared that the system's financial statements were fairly stated in accordance with generally accepted accounting principles; further, no material weaknesses in internal controls or instances of statutory noncompliance were found. As a result, STRS Ohio received an unqualified audit — known as a "clean" opinion — which is the highest level of opinion that an organization can achieve.

## Strong Market Returns in 2013

Preliminary figures show that the STRS Total Fund Return for calendar year is estimated 17.5, which is better than the assumed assumption of 7.75%. The market value of the investment assets as of December 31 is estimated at \$72.4 billion. The preliminary fiscal Total fund return is estimated at +10.3%. Submitted by: *Bill Sears, STRS Observer*

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**SERS** At December's SERS Board meeting the Comprehensive Annual Financial Report was presented. This report is available on the SERS website. The SERS fund is at \$11.7 billion. The Health Care fund has seen no loss and remains stable.

Executive Director Lisa Morris continues to reach out to PERS concerning the issue of recognition of years of service for combined system retirements. Submitted by: ESP Representative *Adele Matias*

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## CONTACT YOUR RETIREMENT SYSTEM

**STRS** 1-888-227-7877 or [www.strsoh.org](http://www.strsoh.org)

**SERS** 1-800-878-5853 or [www.ohsers.org](http://www.ohsers.org)

**OPERS** 1-800-222-7377 or [www.opers.org](http://www.opers.org)

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## DISTRICT REPORTS

### **CAPITAL**

Our annual silent auction was held in November. There was a large selection of items brought by CEA members to be bid on by fellow members. It was a fun afternoon. Over three hundred dollars were collected. The proceeds were donated to our group's biannual project. Our latest project supports the McDowd Homeless Children's program. The program focuses on teaching math and reading skills for our homeless children. The director of the program is a CEA-R member. In addition to the financial assistance, our members will also be donating books and supplies to this worthy program.

For our members who spend the winter in Florida, the annual Florida meeting will be held at Clearwater Beach, a great spot for the "snowbirds".

Members will enjoy a daytime cruise aboard the Calypso Queen and will enjoy a tropical island style buffet. There is also an option of visiting the Clearwater Marine Aquarium. Submitted by: District Representative *Jeff Corbin*

### **CENTRAL**

Another informative meeting is being planned specifically at the request of members in the Marion area. "March into an Informed Retirement" will be held at the Marion Library on March 10. The evening will begin with pizza at 5:30 and the speakers will start the program at 6:00. Representatives from STRS, SERS, Member Benefits, Central Long-Term Care, and an OEA Lobbyist will be the evening presenters. You can register for the event by visiting Central's website: [www.centraloeanea.org](http://www.centraloeanea.org) log in, and select the "March into an Informed Retirement" event from the list, then selecting "I Am Attending" from the drop down menu. Submitted by: District Representative *Sue Christian*

### **NEOEA**

**Save the date: April 30, 2014** at the NEOEA Conference Center. It's not too early to mark your calendar for the third NEOEA-Retired Spring Conference. All NEOEA-R and ORTA members in northeastern Ohio are invited.

Registration & Continental Breakfast at 9:30; two Breakout Sessions; Lunch; and done by 1:00. *Choose from:*

- A. Legislative update
- B. STRS update
- C. Member Benefits update
- D. A special interest workshop.

For more information contact: [neoea-r.ohea.org](http://neoea-r.ohea.org). Submitted by: District Representative *Beryl Burkle*

### **WOEA**

WOEA-R has meetings planned for Wednesday, March-June 2014. Programs start at 11:00 a.m. Please plan on arriving 10-15 minutes early for parking and walking. For questions about the meetings listed or to RSVP contact Emmy Brudzynski e-mail: [emmy.brudzynski@wright.edu](mailto:emmy.brudzynski@wright.edu) or phone 937-610-9917.

**March 19 Aullwood Audubon Center** Dayton 45414. \$15 fee for box lunch, speaker. The \$15 fee is due March 12.

**April 9 Patterson Homestead and Historic Tea**, Dayton 45409. The \$20 fee for tea and program is due April 2.

**May 21 Company 7 BBQ in Englewood**, with the League of Women Voters. Order from menu. RSVP by May 14.

**June 18 Historic Clifton Mill in Clifton** 45316. Short tour and order from menu. Please RSVP by June 11.

**WOEA-R and WOEa** are planning a workshop for teachers and ESPs' entitled: *"What's Up with My Retirement?"* for Saturday, March 22, 2014 from 8:30-12 p.m. at The Centre at Miami Valley 987 E. Ash St. Piqua, Oh 45356. There will be three components: STRS/SERS, OEA lobbyist Robert Davis, and NEA Member Benefits Affiliate Relations, Guy Kendall-Freas. A refundable deposit is required for members (it will be returned at the event). A non-refundable deposit is required for any member spouse/guest who wishes to attend. This workshop is aimed towards members planning to retire within the next 1-5 years. A buffet breakfast will be available from 8:30 to 9:15 a.m. Registration is online at: [www.woea.org](http://www.woea.org) Submitted by: District Representative *Jane Rahn*

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## HOME HEAT ASSISTANCE

This winter season has included some brutal weather that is undoubtedly putting additional pressure on your utility bills (gas &/or electric). Some of you may qualify for the HOME ENERGY ASSISTANCE PROGRAM (HEAP) to help defray these ever-increasing costs. **For more information go to [www.PUCO.ohio.gov](http://www.PUCO.ohio.gov) or call 800.686-PUCO (7826)**

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### 2013-2014 Officers

**John Hoyes**

President

**Marti Huss**

Secretary

**Carol Kinsey**

Vice-President

**David Bowen**

Past President

**Bill Sears, Editor**

## Our Mission Statement

**OEA-Retired** is dedicated to meeting the needs of its members, providing member involvement within OEA, and supporting public education.

## FCPE

A FCPE Convention was held on February 1 in Dublin and the following state-wide candidates were endorsed unanimously for the November election:

*Connie Pillich – Ohio Treasurer*

*Nina Turner – Ohio Secretary of State*

*John Carney – Ohio State Auditor*

*David Pepper – Ohio Attorney General*

In November the Convention unanimously endorsed candidate *Ed Fitzgerald* for Ohio Governor. All state-wide candidates were invited to screen. The following retired members were present at the convention: Tom Counts, Jill Berkmeier, Robert Zatezalo, Karen Andermills, Jim Dansizen, Tom Beck, Dale Kain, Hank Haynes, Judy Novak, Pam Smith, Deloris Rome Hudson, Carol Kinsey, and Bill Sears.

**March is FCPE Month** It's easy to make your contribution to FCPE; go to the OEA Website (ohea.org) and go to the left side to find out how to donate. If you prefer to receive a form, contact OEA Government Relations at: 1-800-282-1500.

## OHIO'S ENHANCED ACTION RECRUITMENT PLAN

Attention all OEA-R/NEA-R members who are paying annual dues – we have a “deal” for you! Are you tired of filing out that renewal form and paying the postage to mail your check in to OEA? By completing your unified lifetime membership in OEA-R/NEA-R through our “member-to-member” enrollment campaign, you will be eligible for a one-in-ten chance to win \$350!! The next 25 members who sign up will also receive a \$25 gas card. This may sound too good to be true, but it is true! **Please contact the OEA-R Secretary, Marti Huss, at [mehuss@hotmail.com](mailto:mehuss@hotmail.com) to find out the details!** Membership has to be completed prior the end of the business day at the OEA RA on May 9, 2014.

You need not be present to win!



Tom Beck and Norm Hillstrom  
at the OEA-R Delegate Caucus



## **WE ARE GOING GREEN...**

You may have noticed that the size of the paper on which *NEWSLINE* is printed has changed. We are *going green*, by using less paper, and reducing publishing costs. This new format will save OEA thousands of dollars each year. **Additionally beginning with the fall, 2014 issue, all individuals with email addresses will only receive an electronic version of NEWSLINE** which will save natural resources and costs including postage and allow you to adjust the font size. For those of you who do not have an email address please rest assured that you will continue to receive hard copies via U.S. Mail. To ensure the smoothest possible transition in our quest to *go green* please remember to update your postal address if you do not have an email address; or if you do have an email address and are not receiving *NEWSLINE* electronically, please provide us with your email address by sending it to your OEA-R staff liaison at: [ottenb@ohea.org](mailto:ottenb@ohea.org) Submitted by: *Bill Otten*, OEA-R Staff Liaison.

## **REGISTRATION FORM**

### **OEA-R Spring Conference - MAY 15, 2014**

There will be a special presentation by naturalist Andy Tipple on the Muskingum River Locks System. Registration includes lunch, visits to the National Road/Zane Gray Museum and the John and Annie Glenn Historic Site. This conference is sponsored by EOEA-R, ECOEA-R and SEOEA-R.

**Breakfast/Registration 9:00 – 10:00**

**Holiday Inn Express - Zanesville Ohio. Send form to Jack Boyd: [1940 Normandy Dr., Zanesville OH 43701-2143](mailto:1940.Normandy.Dr.,Zanesville.OH.43701-2143)**

**Full Name:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

**City:** \_\_\_\_\_ **State:** \_\_\_\_\_

**Zip:** \_\_\_\_\_

**H: (\_\_\_\_) \_\_\_\_\_ C: (\_\_\_\_) \_\_\_\_\_**

**Email:** \_\_\_\_\_

**What is your OEA District?** \_\_\_\_\_

## **CONFERENCE FEES**

**Registration Fee: \$20.14** Includes lunch & Museum/Historic Site tickets.

**Breakfast: \$4.86** Free if staying at the Holiday Inn Express

**Total for Conference:**

**TOTAL ENCLOSED:**

**\$ \_\_\_\_\_ Payable to: OEA-R**

**DEADLINE TO REGISTER: April 1, 2014**

## **ACCOMODATIONS**

A block of rooms is reserved at the Holiday Inn Express, 1101 Spring St., Zanesville (740-297-4751). The discounted rate, including taxes, is \$125.40. **Reservations must be made by April 1, 2014**, for this special rate. **You must make your own hotel reservations.**

**For additional information contact Jack Boyd at [jboyd.eoega@gmail.com](mailto:jboyd.eoega@gmail.com) or, 740-453-2186**

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