



# OREA *News Bulletin*

A Publication of the Oklahoma Retired Educators Association

SUMMER 2009

## Who Fights for You?



Weldon Davis  
OREA President

In preparing to assume the OREA presidency, I asked myself more than once why there is a need for an organization of retired educators in our state.

Now that we're retired, shouldn't we be entitled to relax and enjoy our senior years, knowing that our interests will be protected and promoted by government leaders who recognize and respect the decades of service we gave to our students and the public education system of Oklahoma?

No, I am not a comedian, but I admit that what I just wrote is pretty funny.

Like you, I know why OREA exists, and why it must be given the attention and resources necessary to make and keep it strong. OREA exists to fight for the 45,000 retired educators in Oklahoma. It also exists to fight for a whole new generation of active educators who have yet to retire.

If retired educators don't fight for themselves, who will? Although many others claim they have our interests at heart, the truth is they have other interests more important to them.

OREA is the only organization that exists solely to fight for the interests of retired educators.

I am proud to be your new president. Let's work hard together to strengthen OREA so it can continue to fight for us. Thanks for being a member. Help us recruit those retired educators who aren't our members.

*Weldon Davis*

## Annual State Convention Informs, Inspires and Stimulates Debate

"Together, Not Alone" was the theme of the 2009 OREA Annual State Convention, which met Friday, May 15, on the campus of the University of Central Oklahoma in Edmond. Approximately 400 members attended.

Conventioners were able to choose from six different workshops. Personal finance, health insurance and long term care, and special member benefits topics were complemented by inspirational sessions focusing on celebrating life and releasing the artistic talents that lie within us. The workshops were well attended.

Special awards winners were announced, and more than 40 Very Important Members were honored in a video presentation. Oklahoma Attorney General Drew Edmondson addressed the convention on retirement and related issues, and state Representative Neil Brannon and Senators Susan Paddock and Kenneth Corn spoke briefly in support of the OREA legislative agenda. Each was presented an OREA award for outstanding legislative service to retired educators.

The convention "Annual Report" contained financial reports, committee reports and other information. Vice President Weldon Davis led a recognition ceremony for retired educators who died in the last year, including long time state senator and OREA lobbyist Al Terrill. President Joy Dennis thanked OREA members for the opportunity to serve as the organization's top officer for the last two years. Members approved an Executive Board motion to keep OREA dues at \$36 per year.

In a new convention activity, a silent auction was held, with proceeds going to the OREA Fund to provide financial support for legislative and other candidates supportive of retired educators. More than \$2,600 was raised through the auction and other voluntary contributions.

The afternoon business session generated interest and lively debate as several proposed revisions to the OREA Constitution were presented for approval. As always, numerous door prizes were handed out at the end of the convention, many of them provided by OREA business partners on hand throughout the day in booths outside the convention hall.



# Progress Made During Challenging Legislative Session

Although economic and political circumstances were less than advantageous, the diligent work of hundreds of Oklahoma Retired Educators Association members during the 2009 legislative session ensured that progress was made on the association's agenda.

From February through May, OREA hometown lobbyists maintained contact with legislators, meeting with them in their home districts, calling on the telephone, writing letters, sending e-mail messages, and coming to the state Capitol for face-to-face visits. They continuously reminded lawmakers of retired educators' critical need for a 4% fair and equal cost-of-living adjustment (COLA) and an improvement in the state health insurance premium subsidy.

Although faced with a \$900 million state budget shortfall, legislators – including new Republican leaders in the state Senate – began to acknowledge the OREA message that retired educators deserve fair and equal pension treatment compared to their retired colleagues in other state retirement systems.

One measure, SB 1016, by Sen. Susan Paddock (D, Ada), calling for an incremental increase in the annual assumed COLA rate for the Teachers' Retirement System, passed the Senate 45-0, but did not get a hearing in the House of Representatives. It remains alive for the 2010 session. Other COLA and health insurance premium bills also remain alive for next session, provided they are referred to the legislative actuary for fiscal study.

Lawmakers, with the help of federal economic stimulus funds, were able to appropriate \$20 million aimed at reducing the retirement system's unfunded liabilities. Coupled with \$27 million appropriated in the two previous legislative sessions, the new funding should prove helpful in making TRS healthier in the long run, and should also give much needed budget help to local school districts and other employing agencies to meet payroll tax obligations to TRS.

As important as acquiring new TRS funding, OREA hometown and professional lobbyists fought hard to protect TRS dedicated revenues. Knowing that the loss of overall state revenue through tax cuts results in a proportional loss of TRS income, they sought to educate lawmakers regarding the broader implications of their taxing decisions. No new general tax cuts were passed.

Another accomplishment was protection of the TRS defined benefit plan design against the legislative advocates of a defined contribution plan. OREA believes that educators are far better served by a defined benefit pension plan guaranteeing benefits for life, rather than a defined contribution plan with no benefits guarantees, and which also imposes investment risks on the retiree or the person preparing for retirement.

In summary, modest progress on the OREA legislative agenda in the 2009 legislative session laid a foundation for the possibility of significant accomplishments in the 2010 session. Active member involvement will be critical to our future success.

## OREA Board of Directors

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Weldon Davis (405) 495-1069

### Vice President

Elaine Dodd (918) 744-5830

### Past President

Joy Dennis (580) 237-4990

### Central Director

Roy Cates (405) 324-7751

### East Central Director

Theo Crawley (405) 786-2436

### North Central Director

Bernie Jackson (580) 762-7330

### Northeast Director

Marian Clark (918) 443-2645

### Northwest Director

Nancy Jewell (580) 233-4173

### Southeast Director

Sharon McKeever (580) 933-7806

### South Central Director

Charles Barrick (580) 332-0052

### Southwest Director

Jane Mershon (580) 355-1462

### State Membership Chair

\* Vacant \*

### Government Relations Chair

Bernie Jackson (580) 762-7330

### Finance Chair

Matti Palluconi (918) 341-8279

### Communications Chair

Joe Wynn (580) 335-7114

## Convention Delegates Approve Revisions in OREA Constitution



Several proposed revisions to the OREA Constitution generated lively debate at the May 15 convention, before finally receiving approval by more than a two-thirds majority of members in attendance. Among the changes was an alteration in the voting membership of the OREA Executive Board, with the removal of voting privileges for the appointed chairs of four standing committees. The committee chairs will remain as ad hoc members of the Board.

The name of the Executive Board was changed to Board of Directors, but its authority will remain the same. A separate Executive Committee was created to carry out planning and administrative duties for the Board of Directors. The Executive Committee will consist of the President, Vice President, Past President and a fourth member elected from the Board of Directors.

Two-year terms of office, rather than the current one-year terms for President and Vice President, were authorized, beginning July 1, 2010. Constitutional language requiring certain association experience as a prerequisite to run for the office of President was also deleted. The names of the Nominations and Legislative committees were changed to Elections and Government Relations committees, respectively.

One of the more significant changes approved was the creation of a House of Delegates to serve as the legislative body of the organization. The House of Delegates will meet for the first time in May of 2010 as a part of the annual state convention. OREA members will elect delegates at the local unit level, with representation based on a local unit's proportional share of total OREA membership as of March 1 preceding the meeting of the House of Delegates. Every local unit will qualify for at least one delegate. The Board of Directors will develop and announce procedures for implementation of the new House of Delegates.

Other non-substantive constitutional changes were also approved. The Board of Directors will now develop new OREA Bylaws to ensure conformity with the revisions in the Constitution. Members seeking specific information regarding the constitutional changes may contact Executive Director Norman Cooper at (405) 523-4371 or (800) 522-8091 toll free statewide.

## New Leadership Team



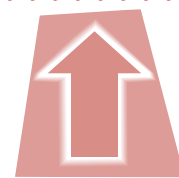
Effective July 1, the new leadership team of President Weldon Davis of Bethany and Vice President Elaine Dodd of Tulsa took office. For the past two years, Davis served as OREA Vice President, and Dodd was Chair of the Legislative Committee and a member of the OREA Executive Board.

Both Davis and Dodd have had long careers of service to their profession as leaders of the Oklahoma Education Association and Tulsa Classroom Teachers Association. Employed for many years as a teacher and counselor in the Lawton Public Schools, Davis became OEA President in 1980, serving six consecutive years in that office. He later became an administrator in the Oklahoma City Public Schools, serving in that capacity until his retirement in 2004. His wife, Marilyn, is an OREA member and current President of the Oklahoma County Retired Educators Association. She also retired as an Oklahoma City administrator in 2005.

Dodd, a former Tulsa Public Schools teacher, was a leader and officer of the Tulsa Classroom Teachers Association for many years. Retired since 2001, she has been a leader of the Tulsa City Retired Educators Association, most recently its president. Her husband, Doug, is an attorney and former member of the Tulsa Public Schools Board of Education.

OREA welcomes President Davis and Vice President Dodd as our new leaders. We look forward to great things during their tenure.

## OREA Membership Exceeds Last Year's Record High



For the membership period September 1, 2007, through August 31, 2008, OREA membership increased by 489 to a record high 14,102.

To show that records are set to be broken, at the end of May, 2009 – with three months remaining in the membership year – OREA had already exceeded last year's high, with 14,179 members.

When organizations in all walks of life are struggling against the economy and other forces to maintain members, programs and services, OREA is fortunate to be growing. Thanks, OREA members and leaders! OREA owes its success to you!

## ING Chosen as Investment Advisor for TRS 403(b) Program

After an extensive search, the Teachers' Retirement System Board of Trustees on May 13 hired ING Life Insurance and Annuity Company as service provider for the retirement system's 403(b) tax sheltered annuity plan.

More than 5,000 TRS active and retired members currently have accounts in the plan, which was established in 1964. Investments total more than \$200 million.

ING will offer 403(b) participants a wider range of investment options to meet individual financial planning needs. Under the current program, only one investment option is offered.

According to TRS, "the transition to ING will begin July 1, 2009 and will be completed in time for the start of the 2009-10 school year."

OREA members can learn more about the new TRS 403(b) program by visiting the TRS internet website at [www.ok.gov/TRS/](http://www.ok.gov/TRS/).

*North American Life Plans, OREA's endorsed provider of retirement planning services, is proud to announce an important addition to our team. Sheryl Prichard of Choctaw has joined us as our Regional Manager in Oklahoma.*

*Here are a few words from Sheryl about the valuable services she looks forward to providing to OREA members:*



I am honored to have the opportunity to address OREA members in your newsletter and to be able to offer my financial services and advice to you.

I come from a long line of teachers and I have a great respect for your profession. I want to use my financial expertise to educate you about the obstacles you may face in retirement. I will do this through educational seminars and one-on-one counseling.

I have worked in the financial services industry for 30 years. I feel it is important to continue to educate myself so that I can be the best financial advisor I can be. I hold the RFC® designation and my Oklahoma Insurance License. I also obtained my CLU, FLMI and ACS designations. I know all these acronyms may not mean much to you, but I assure you they required dedication and a philosophy of providing value, integrity and service to my clients.



**LifePlans, LLC™**

On a personal note, I live in Choctaw with my husband of 34 years, Thom, and we have two children, Lindsey and Jacob.

Over the next few months you will see invitations to our financial workshops, and I truly hope you will come join me.

Let me show you how I can grow your assets safely, reduce your tax burden and protect your estate for your heirs. I will assess your individual situation and provide you with a comprehensive financial plan that addresses your unique objectives.

I can meet your needs through our solution-based products which include: fixed annuities, index annuities, Medicare Supplement, Medicare Advantage, reverse mortgages, life insurance, life settlements and final expense insurance.

Our philosophy is to always go the extra mile to ensure you have all the pieces in place to preserve and protect your hard-earned assets. I can be your trusted advisor and I will fulfill all your financial needs. I hope you are as excited to meet me as I am to meet you!

If you have any questions or concerns, please feel free to contact me at 405-323-3204 or you may leave a message for me at North American Life Plans' home office by calling toll-free 1-888-362-1214.

Sincerely,  
Sheryl Prichard

~ Advertisement ~

## EDS PROMISES HEALTHCHOICE NORMALCY BY MID-SUMMER

OREA members have no doubt paid attention to the many negative news reports about difficulties faced by HealthChoice in dealing with a huge claims backlog resulting from a January 1, 2009 changeover in third party claims administrator. OREA first reported on the problem in the April issue of the News Bulletin.

Each month the Oklahoma State and Education Employees Group Insurance Board, which administers HealthChoice, receives a report from representatives of EDS, the new claims processor, regarding progress in clearing unpaid claims. At the June 25 regular meeting of the Board, the EDS official present said the company is getting very close to a return to normalcy, although he stressed there will always be some back claims even in the best of times, a fact also attested to by Bill Crain, chief HealthChoice administrator.

For more information on the general status of EDS claims processing, members are encouraged to visit [www.sib.state.ok.us/](http://www.sib.state.ok.us/).

## Jane Mershon Replaces Jim Griffin on OREA Board

Jane Mershon recently was elected to the position of Southwest District Director. She began a three-year term of office on the OREA Board of Directors July 1.



A former OREA President, Mershon is widely respected for her commitment to association programs and willingness to advocate for retired educators. She replaces Jim Griffin, who leaves the Board upon completion of a three-year term.

Among other Board responsibilities, Mershon will seek to foster good communications between local unit leadership and OREA, and will work to develop effective local unit leaders and strong organizations.

OREA thanks Jim Griffin for his many contributions and we welcome Jane.

## TRS Assets on Their Way Back?

At the June 25 regular meeting of the Teachers' Retirement System Board of Trustees, investment advisors from Gregory W. Group of Tulsa advised trustees that total TRS assets had recovered to approximately \$7.4 billion. This represents an increase of over \$1 billion dollars from a low point reached several months ago. The value of the TRS portfolio stood at approximately \$9.4 billion as late as October 2007.

Current growth in the value of investments is welcome news, but advisors warned that it is far too early to predict a wholesale turnaround in the financial markets.

## AARP SEEKS SAFE DRIVING INSTRUCTORS



Oklahoma AARP is seeking volunteer instructors for its driver safety program. Utilizing specially-developed videos and workbooks, instructors would have responsibility for organizing and promoting safety courses. They would work under the direction of AARP district coordinators over a multi-county area. Volunteers would be required to teach a minimum of three classes per year, with no maximum limit. Schedules can be very flexible. Qualities sought for instructors include good communication skills and a strong interest in promoting safe driving. Initial training and follow up workshops will be provided. Approved expenses will be reimbursed. OREA members interested in this program should contact Tillman Ryser, Coordinator for the AARP Driver Safety Program, 10303 E. 23<sup>rd</sup> Place, Tulsa, OK 74129-4620. Mr. Ryser's telephone numbers are (918) 663-3773 or (918) 637-5055 cell. His e-mail address is [ctryser@aol.com](mailto:ctryser@aol.com). More information can be obtained by visiting [www.aarp.org](http://www.aarp.org).

## → IT'S YOUR BENEFIT ←

It is a benefit we hope your beneficiaries will never have occasion to receive, but members are reminded that OREA membership comes with a \$1,000 accidental death and dismemberment benefit, payable through American Fidelity Assurance Company. At age 70 the benefit drops to \$500. Members should inform family, and those who will be expected to carry out financial responsibilities upon the member's accidental death, of this benefit. OREA, rather than American Fidelity, should be contacted in the event of a claim.



# OREA Volunteers Make A BIG Difference!

\* Counties not listed below did not report volunteer hours \*

| COUNTY                         | With Our Youth | With Our Community | With OREA | Total Hours |
|--------------------------------|----------------|--------------------|-----------|-------------|
| Adair County                   | 2,420          | 7,315              | 613       | 10,348      |
| Blaine County                  | 322            | 1,659              | 432       | 2,413       |
| Cleveland/McClain Counties     | 345            | 1,198              | 399       | 1,942       |
| Creek County                   | 3,803          | 4,652              | 566       | 9,021       |
| Delaware County                | 365            | 2,209              | 476       | 3,050       |
| Kay County                     | 1,772          | 3,715              | 607       | 6,094       |
| LeFlore County                 | 327            | 2,989              | 248       | 3,564       |
| Lincoln County                 | 207            | 3,799              | 10        | 4,016       |
| Love County                    | 147            | 2,428              | 19        | 2,594       |
| Major County                   | 357            | 7,632              | 317       | 8,306       |
| Mayes County                   | 876            | 2,068              | 136       | 3,080       |
| Nowata County                  | 685            | 1,249              | 70        | 2,004       |
| Oklahoma County                | 695            | 4,673              | 423       | 5,791       |
| Pontotoc County                |                |                    |           | 3,645       |
| Pottawatomie County            | 695            | 1,680              | 314       | 2,689       |
| Texas/Cimarron Counties        |                |                    |           | 3,058       |
| Woodward/Harper/Ellis Counties | 359            | 456                | 263       | 1,078       |

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