



Public Employee Retirees, Inc.™

Perspectives

Serving OPERS Members Since 1948

4th Quarter 2024

Mission Statement:

To protect and preserve OPERS pension and benefits programs and advocate for changes that are in the best interest of PERI members, while providing value through communications and education of the membership through our districts, local chapters and external partnerships.

In This Issue

Chairman's Message	Page 1
Executive Director Report	Page 2
Legislative Report	Page 2
Important Numbers	Page 3
OSHIIP	Page 3
District News	Page 4
PERI Annual Meeting	Page 5
PERI Board and Staff	Page 8

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Chairman's Column

by Richard L. Ross



I have now started my final year as your chairman. The PERI constitution limits the chair to 2 two year terms. The term limitation ensures that new ideas continue to come into the organization and that it does not become the organization of one person.

It has been my pleasure since the last column to preside over the 50th annual meeting of our organization. Our partnership with OPERS has kept our pension system the best in Ohio and one of the best in the country. We will continue the fight to protect our defined benefit pension system from all who may wish to destroy it. Since the last newsletter I have visited chapters in Knox, Cuyahoga, Stark, and Morgan Counties and continue to be strengthened in my position as your chair by the determination and dedication of our membership. We are looking at setting up online meetings for those members who live out of state.

The biggest issue in my time as your chair is the elimination of the WEP/GPO penalty imposed upon the Social Security of OPERS retirees and their surviving spouses. I have also been contacted by members who live outside of Ohio as to how they can influence their representative and senators to vote for the repeal. Your dedication has seen both our Ohio United State Senators as co-sponsors of the Senate bill to accomplish this, and eleven of the fifteen Congressional House Representatives from Ohio being co-sponsors of the House repeal bill. There are 329 co-sponsors of the House bill and 62 co-sponsors of the Senate bill. There are the necessary 218 signers of the discharge petition to take the House bill out of committee and it now awaits a vote by the entire House. The Ohio US Representatives who signed the petition are Representatives Landsman, Brown, Carey, Sykes, Beatty, Kaptur, Balderson, and Joyce. If one of these is your representative, thank them. Call Speaker Johnson and Majority Leader Scalise to set the bill for a vote. Be prepared to ask your representative to vote for HB 82 when it comes up for a vote.

As you may meet your state senator and representative or candidates for those offices, politely educate them on the strength of OPERS and the necessity to continue to keep it strong. Point out to them that the defined benefit pension is the best pension system and that holding an elected position in Ohio makes them a member of that system and a beneficiary in the future.

Let us all continue to do what we can to keep and strengthen our pension system for which we worked. We, at the state level, are nothing without the support of all of you.

A Message from Your Executive Director

by Lezlie Garcia



Members,

Our 50th Annual Meeting was a great event, providing our members with a unique opportunity to hear directly from OPERS Executive Director Karen Carraher on the state of your pension fund. We were privileged to have Ohio Secretary of State Frank LaRose present PERI with a state proclamation, shedding light on Ohio's efforts to ensure a fair voting process. We look forward to your participation in our 2025 Annual Meeting next September.

If you are receiving this newsletter, live in Ohio, and have yet to visit your local county chapter, we encourage you to get involved locally and learn about the impactful work of your local chapters. For our members outside of Ohio, we are excited to announce that PERI will establish a virtual chapter in the first part of 2025, ensuring that you are not just a part of our organization but also a part of our plans. We will send an email invitation, so please call our office at 1-800-247-7374 or visit our website to update your email address.

Our vigilance on the critical Windfall Elimination Provision (WEP) and Government Pension Offset (GPO) bills, HR 82 and SB 597, continues. Our legislative representative, Mara White, and Board Chair Richard Ross have provided insightful articles on these issues. With the discharge petition moving HR 82 out of committee, we are hopeful that U.S. House Speaker Mike Johnson, in DC, will bring this bill to the floor for a vote. This progress is a testament to the power of our collective advocacy efforts, and each of you plays a crucial role in this.

Our annual and associate dues renewal letter should be mailed to our members by Nov 8, 2024, so look for that in the mail. If you want to pay online, go to PERI's website (www.operi.org) under membership-Join and renew your membership. Our online payment process is secure, convenient, and faster than mailing a check or credit card information, ensuring your membership is renewed without any delay.

PERI deeply values and relies on your membership. Your continued support and generosity have been instrumental in our mission over the years. We extend our heartfelt thanks to each of you, recognizing the significant role you play in our organization. Your membership is not just a formality, but a vital part of our collective strength and success.

Ohio Legislative and Political Update

by Mara White, Byers, Minton & Associates



We hope this update finds you in good health and spirits. I want to take this opportunity to share some important public policy updates with you as the Ohio Legislature gets ready to head to the Ballot Box next month.

Legislative Update

Since the previous quarterly report, the legislature has not returned for session while they focus on their campaigns. It is standard during an election year that the General Assembly will break for the months of July through October to focus on their campaigns. Members will return just after Election Day for what is historically a marathon few weeks referred to as the "lame duck session".

However, with the battle for the House Speakership largely unsettled, there is little direction regarding how much (or how little) work either Chamber is prepared to do during the Lame Duck Session.

WEP/GPO Repeal

September was a HUGE month for HR82 which would repeal both WEP and GPO. A discharge petition was initiated by the sponsors and received enough signatures to bypass the House Committee process. What happens now is that after 7 calendar days the Sponsors may make a motion for a full House Vote, the speaker must also recognize this motion. The Sponsors have stated that they remain committed to HR 82 receiving full floor vote, however Congress typically breaks in October so we will likely see a November vote.

This Quarter in Retirement System News

As was discussed by Director Carraher during our annual meeting, one of our main goals is to ensure that OPERS is held harmless for the sins of other systems. There has been some discussion in the Ohio Retirement Study Commission about the benefits of combining the 5 different systems. This is something that we wouldn't support and is not desirable from the perspective of the OPERS in-house leadership as well.

However, after another difficult month for STRS where their leadership resigned after a narrowly defeated vote of no-confidence it will be important that we remain vigilant that OPERS remains focused on its current set of beneficiaries and not what other systems may or may not need.

IMPORTANT NUMBERS FOR YOU TO HAVE ON HAND

(800) 222-7377 OPERS
(844) 287-9945 Medicare VIA Benefits*
(833) 939-1215 Non-Medicare VIA Benefits*
(888) 262-4874 Metlife Dental & Vision
(800) 633-4227 Medicare
(877) 556-4582 AMBA
(800) 772-1213 Social Security
(877) 644-6457 Deferred Comp
(800) 686-1578 OSHIIP

*If you need information concerning your HRA account or insurance, call VIA Benefits. If you have questions concerning your pension, please call OPERS.

**If you are interested in receiving this
publication electronically, please contact us
at (800) 247-7374 or laurie@operi.org**

Important Note for Our Members

Public Employee Retirees, INC (PERI) is not POP5 (Protect Ohio Pensions), nor do we have any affiliation with the organization. We keep a full-time lobbyist at the statehouse, Mara White of Byers, Minton & Associates. We are the only association that is focused exclusively on OPERS' pension and benefits and always advocate on behalf of the retiree.

All of PERI's communications will have the State of Ohio flag as the E in our logo. Receiving this newsletter confirms that you have an active membership with us. If you are an annual or associate member, you will be notified of membership renewals in mid-November. Please call our office at 1-800-247-7374 if you need any assistance.



OSHIIP an Empowering Resource for Ohioans During Medicare Open Enrollment

From ODI Director Judith L. French

COLUMBUS – I am excited to announce the start of our Ohio Senior Health Insurance Information Program's (OSHIIP) annual statewide Medicare Checkup events.

These free, virtual and in-person events are a tremendous opportunity for the nearly 2.5 million Ohioans on Medicare and in open enrollment, which runs Oct. 15 to Dec. 7, to get unbiased help sorting out health insurance coverage that will best suit their needs for next year.

The events cover Medicare basics, plan comparisons, prescription drug coverage, financial assistance, and cost-saving tips. Prior to Oct. 15, the focus is on educational sessions. Once open enrollment begins, OSHIIP's Medicare experts provide personalized plan comparisons and one-on-one counseling.

With Medicare plan coverage changing annually, it is essential that Ohioans review their options and research covered prescription drugs and in-network health care providers, even if they are interested in staying in their same plan. We are also warning Ohioans to guard against advertising and sales pitches that overreach as well as scams.

Ohioans may encounter a flood of ads promoting "the best" Medicare plans. Caution is advised as some offers might seem too good to be true. Know what marketers are prohibited from doing. To combat scams, guard personal information and avoid giving money in exchange for services like enrollment help or prescription plan sign-ups.

At the Ohio Department of Insurance, we are here to help. OSHIIP's Medicare experts are ready to empower Ohioans on all of these fronts. The state's official Medicare educational and counseling support program, OSHIIP saved Ohioans more than \$42.5 million over the past year through its efforts assisting those on Medicare.

Ohioans can find the Medicare Checkup events schedule, search by county, and register for events and webinars, at insurance.ohio.gov. For personalized OSHIIP assistance, Ohioans can schedule virtual appointments, email oshiipmail@insurance.ohio.gov, and call 800-686-1578.

District News

PERI Announces Search for District 4, 6, and 8 Representatives

We are seeking candidates to fill the positions of District 4, 6, and 8 Representative. Counties within these districts can be found on page 12. To be a District Representative, one needs to live in the district and be willing to travel throughout the district and to Columbus for bi-monthly board meetings. If you are interested and want more details, please call us at (800) 247-7374 or send us an email at laurie@operi.org.



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Public Employee Retirees, Inc.



Yes!

They have accomplished a great deal.

Can our generation of retirees
accomplish the same?

Yes! But...

it will, as it always has, require the faithful and personal participation of every single PERI member!

You can help!

If you haven't already done so, join a local PERI chapter and make a commitment to attend the meetings.

The following is a list of benefits you will gain by your membership in a local PERI chapter:

- Opportunities to hear from and provide feedback to your Ohio Senator and Representative
- Expert presentations from various elder-related groups
- The opportunity to meet other OPERS members like you
- Meet your PERI District Representative
- Updates on pending legislation that could impact your pension benefits
- Presentations from AMBA, a PERI endorsed provider of products, benefits and services designed especially for public sector retirees like you
- Chapter legislative officers will keep you current on all bills under consideration in the Ohio General Assembly that could impact your pension.

Please check our website at
operi.org to find get information
about attending your local chapter



PERI 2024 ANNUAL MEETING

PERI Treasurer John DiPietro introduced the Franklin County Sheriff Department Color Guard, who performed the flag ceremony.

Chair Richard Ross led the National Anthem and called the meeting to order.

Jim Range, District 9 Representative, gave the invocation.

Treasurer DiPietro led the Assembly in reciting the National Anthem. He then gave opening remarks and introduced the morning keynote speaker, OPERS Executive Director Karen Carraher.



Ms. Carraher presented an update on pension and health care funding. She gave a 5-year history of OPERS investment returns, sharing that the 2023 investment results positively impacted funding. She assured the audience that OPERS remains strong and adequately funded.

On health care, Ms. Carraher said that although OPERS is not currently funding the health care plan, the board approved an allowance increase for 2025. She shared that the Medicare base allowance will increase by \$50 from \$350 to \$400 through 2030 and that Pre-Medicare will remain at \$1200.

Ms. Carraher reviewed several bills and how they could impact the pension fund and its members.

AMBA gave a short presentation about the benefits that they provide for members.



The Assembly broke to attend a breakout session that they chose at registration. The choices for breakout sessions included OPERS Education, Attorney General-new scams, Legislative Networking & Grassroots lobbying, and AMBA benefits.



The members reassembled in the Ballroom for lunch.

Ms. Garcia presented the Spirit of PERI award to the winner, Donna Riley, PERI president from Adams County. Adams County Treasurer William Jones accepted

the award on her behalf.

The Education Committee raffled off baskets from the 11 PERI Districts to the winning attendees.

Jen Sotlar, from AMBA, held a drawing for a tablet. Beverly Wolford, from the Muskingum County chapter, was the lucky winner.

Mr. Ross recognized outgoing District Representatives Bonnie Mitchell (District 6) and Rosemary Dahmann (District 4).





Mr. DiPietro introduced Ohio Secretary of State Frank LaRose as the afternoon's keynote speaker to the Assembly.

Mr. LaRose spoke about election integrity in the state of Ohio and said that we can be confident that our elections are fair, and our ballots are secure.

After Mr. LaRose's presentation, we conducted our business meeting. Mr. Ross led by presenting the Chair's report.

Mr. Ross shared information regarding the legislative progress of the WEP/GPO bills. He urged members to contact their U.S. Congressmen and encourage them to sign a discharge petition.



Mr. Ross also asked members to get to know their state senators and representatives to influence them when we need them to support our position on legislative issues.

Lastly, Mr. Ross shared that the more members we have, the more effective he is as the Chair. There is strength in numbers, and our impact is more significant when retirees band together with the same goal of protecting our benefits.



Treasurer DiPietro presented the 2023 Financial Report.

TREASURER'S REPORT December 31, 2023, Balance Sheet

ASSETS

Current Assets

Bank Accounts	\$154,505.16
Other Current Assets	
Investments	\$2,015,699.46
Prepaid Postage	\$355.49
Total Other Current Assets	\$2,016,054.95

Total Current Assets	\$2,170,560.11
Fixed Assets	\$12,290.99
Other Assets	\$5,175.00

TOTAL ASSETS	\$2,188,026.10
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LIABILITIES AND EQUITY

Liabilities

Current Liabilities	\$-10,848.51
Long-Term Liabilities	\$2,199,609.61

Total Liabilities	\$2,188,761.10
Equity	\$-735.00

TOTAL LIABILITIES AND EQUITY	\$2,188,026.10
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Mr. DiPietro introduced PERI's Executive Director, Lezlie Garcia.



Ms. Garcia began by saying that she advocates and makes recommendations to the Board for what is in the best interest of the PERI members. This past year, she has had the privilege to speak at most District annual meetings and many chapters to inform members and to listen to their concerns. Her focus this next year will be to help grow membership to increase the influence that we have over pension related legislation. She welcomes any suggestions, ideas or collaborations.



Mr. DiPietro introduced Mara White from Byers, Minton & Associates.

Ms. White shared that the legislature has not returned for the fall session while they focus on their campaigns. Members will return just after Election Day for what is historically a marathon few weeks referred to as the "lame duck session." With the battle for the House Speakership largely unsettled, there is little direction regarding how much (or how little) work either Chamber is prepared to do during the Lame Duck Session.

Ms. White reported that in September, we saw movement on HR 82, which would repeal both WEP and GPO. The sponsors initiated a discharge petition, which received enough signatures to bypass the House Committee process. We will likely see a November vote on the resolution.

Ms. White shared details about the Ohio Senate race and activity surrounding Ohio House leadership.

Ms. White said the Ohio Retirement Study Council has discussed the benefits of combining the five different systems. We and OPERS leadership would not support that.



Mr. Ross presented the oath of office to District

Representatives from Districts 2, Sharon Drerup, and 10, Mark Faust.

Mr. DiPietro held the 50/50 drawing and presented the prize to JoAnn Aylsworth.

Mr. Ross led the singing of God Bless American and adjourned the meeting.





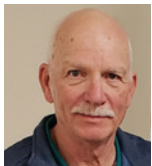
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4th Quarter 2024 Newsletter!

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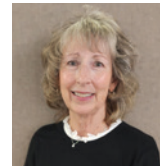
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Assistant

District 1 Counties:
Defiance, Fulton, Henry, Lucas, Ottawa,
Sandusky, Williams, Wood

District 2 Counties:
Allen, Auglaize, Hardin, Mercer, Paulding,
Putnam, Shelby, Van Wert

District 3 Counties:
Champaign, Clark, Darke, Greene, Logan,
Miami, Montgomery, Preble

District 4 Counties:
Adams, Brown, Butler, Clermont, Clinton,
Hamilton, Highland, Warren

District 5 Counties:
Crawford, Hancock, Knox, Marion, Morrow, Richland, Seneca, Wyandot

District 6 Counties:
Delaware, Fairfield, Fayette, Franklin, Licking, Madison, Pickaway, Union

District 7 Counties:
Gallia, Jackson, Lawrence, Meigs, Pike,
Ross, Scioto, Vinton

District 8 Counties:
Athens, Hocking, Monroe, Morgan,
Muskingum, Noble, Perry, Washington

District 9 Counties:
Belmont, Carroll, Coshacton, Guernsey,
Harrison, Holmes, Jefferson, Tuscarawas

District 10 Counties:
Ashtabula, Columbiana, Geauga, Lake,
Medina, Summit, Wayne

District 11 Counties:
Ashtabula, Columbiana, Geauga, Lake,
Mahoning, Portage, Stark, Trumbull