



OREA *News Bulletin*

Spring 2010

A Publication of the Oklahoma Retired Educators Association

EXCITEMENT BUILDS FOR ANNUAL STATE CONVENTION

A new year, new location, new workshops, new agenda and a great keynote speaker are all ingredients helping to build excitement for the 2010 OREA Annual State Convention. Scheduled for the first time in Stillwater, the convention promises to attract hundreds of OREA members eager to be entertained and informed.

The OREA Annual Convention will be held in Stillwater Friday, May 14, at the Wes Watkins Conference Center on the campus of Oklahoma State University. Located at the intersection of Hall of Fame Boulevard and Washington Avenue (due north of the OSU football stadium), the venue should be easy to find. Ample parking (free with your convention ticket) will be available surrounding the convention building.

The day's events will kick off at 9:00 a.m. with the first of two forty-minute workshop sessions, each session featuring three different presentations designed to inform, entertain and inspire. The second session will feature three new presentations. Workshop reviews from the 2009 convention were outstanding, and we are confident this year's offerings will prove popular as well.

No convention would be complete without a dynamic keynote speaker, and that is what we will have! Frosty Troy, former publisher and still

crackerjack writer for the lively **Oklahoma Observer**, will bring his wit and wisdom to Stillwater to capture the attention of all in attendance. You never know what Frosty will say about hundreds of political, educational and social topics, but you can bet it will be entertaining and solidly based on decades of personal observation of state and national affairs.

The convention will also feature special entertainment and awards, including the always popular Very Important Member video presentation. Door prizes will be given throughout the day. A silent auction benefiting the OREA Fund will also be conducted during the morning hours.

Early bird discount ticket sales have been brisk, so a strong convention turnout is anticipated. To take advantage of the discount, members are encouraged to send in their ticket orders as soon

as possible after receiving this newsletter in the mail. Ticket orders received by OREA within two weeks of receipt of this newsletter will be processed for the special price of \$12.50 per ticket. There-

after, the individual ticket price will be \$15.00. Since tickets are transferable among members, early purchase makes good sense. Your ticket will include parking, continental breakfast and refreshments, noon buffet luncheon, and conference materials.

The convention will conclude at 1:30 p.m., followed by the inaugural business session of the House of Delegates.



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It's a Free Country, But Let's Keep Our Voice Strong

Word has it that in recent weeks most retired Oklahoma educators received literature in the mail from a new group representing itself as a retired educators' organization. It apparently is soliciting membership, and offering dues a little less than OREA's. Our reaction: it's a free country, but shouldn't all retired educators remain united to keep our voice strong?



Weldon Davis
President

Like most Americans and Oklahomans, OREA values freedom of choice in all aspects of our lives. Our experience, however, has taught us that not all choices are good ones.

For 58 years, the Oklahoma Retired Educators Association has been the independent retired educator voice in our state. ...Continued on page 5

OREA: STRONG. YOUR VOICE FOR THE FUTURE.

If you pay dues annually, don't forget to mail in your membership dues check for this year (September 1, 2009-August 31, 2010). Just complete the annual membership form on the right and return to OREA or your local county membership person. Remember to send your local dues to your local membership chair. If you want to avoid renewing each year, choose the continuous membership form below to have your dues payroll deducted monthly in the amount of \$3.00.

2009-2010 MEMBERSHIP FORM

OREA (State) - Select One

- OREA Annual (\$36.00)
- Continuous (3.00 per month withheld by TRS)
- Be sure to sign the form below

NEA-Retired (Optional) - Select One

- NEA-R Annual (\$25.00 - cannot be payroll deducted)
- NEA-R Lifetime (\$200.00 - cannot be payroll deducted)

~ Dues payable by check or money order to OREA ~

The following section must be completed - please print

Name _____ Social Security Number (required by TRS) _____

Address _____

City _____ State _____ County _____ Zip _____

Telephone _____ Email _____

***Continuous Membership Authorization (Signature needed only for continuous membership)**

I hereby authorize the Teachers' Retirement System of Oklahoma to deduct **\$3.00 each month** from my benefit check and to remit same to the Oklahoma Retired Educators Association for payment of ANNUAL DUES. This authorization is to remain in effect until cancelled by written notice to the Oklahoma Retired Educators Association. I understand this is a voluntary authorization and my receiving a monthly benefit allowance is not dependent on membership in this Association.

Signature _____

Date _____

Please return your payment or dues deduction form to OREA * P.O. Box 18485 * Oklahoma City, OK 73154



for the 2010 State Convention

Arriving in Stillwater the Day Before? Come to the OREA Hospitality!

OREA members arriving in Stillwater the day before the Annual State Convention and House of Delegates are cordially invited to attend the OREA hospitality at Joseppi's Italian Kitchen at 223 E. Hall of Fame Boulevard. Complimentary hors d'oeuvres and non-alcoholic beverages will be provided. Come join us and have a good time visiting with old friends or making new ones. The hospitality will begin at 6:00 p.m. and end around 8:00. Dress will be casual.

OREA has reserved a block of rooms at the Microtel within short walking distance of Joseppi's. It is a new hotel with nice amenities. If looking for overnight lodging, contact Microtel reservations (405.372.7100) to inquire about room availability. Inquire also about the OREA rate of \$89.95 per night for up to four guests per room (block ends April 30). A hot breakfast is included. Located at 423 E. Hall of Fame Avenue, the Microtel facility is within one-half mile of the Wes Watkins Conference Center, the site of the convention.

Please be advised that competition for lodging promises to be keen in the days surrounding the convention, as Stillwater is the site for the annual Oklahoma Special Olympics the same weekend. Make your reservations soon.



The Retirement Planning Puzzle

- Sheryl Prichard, North American Life Plans, LLC, presenter

FISH!

Learn how to use four principles: *Play, Be There, Make Their Day* and *Choose Your Attitude* to bring passion and purpose to your life. Floyd Cox, National Education Association, presenter

For The Love of It

We all have the ability to love what we do through honoring our passion, making a contribution to those around us, and expressing gratitude. Bonnie Hammock, Oklahoma Education Association, presenter

What You Need to Know & More about Long Term Care

- Mitch Kuhn and Bill Stone, National Health Administrators, presenters

Protect...Detect...Report - Don't Be a Victim of Medicare Fraud

- Colleen Black, Oklahoma Insurance Department, presenter

Add Value to Your OREA Membership

- Art Dunham, Association Member Benefits Advisors, presenter

Continental Breakfast
8:30 a.m.

Luncheon
12:00 noon

2010 OREA CONVENTION

Name _____

Address _____

City, State & Zip _____

Tickets: \$12.50 each if purchased by April 30
\$15.00 each if purchased after April 30

Oklahoma State University
Wes Watkins Conference Center
Stillwater, Oklahoma
Friday, May 14, 2010

Number of tickets ordered _____

Amount Enclosed _____
(Price includes breakfast, lunch & parking)

Mail this order form to: OREA, P.O. Box 18485, Oklahoma City, OK 73154
Your tickets will be mailed to you - Pre-registration is required!

House of Delegates Taking Shape

Thanks to the work of the Constitution Committee, the framework and many of the details of the inaugural meeting of the House of Delegates have been completed. The new OREA legislative body will convene around 1:45 p.m., Friday, May 14, in Stillwater, shortly after adjournment of the annual state convention.

Local presidents have been advised of their unit's delegate allocation. By virtue of their elected positions, all local presidents will be official delegates. Each unit will have an additional delegate for the first 30 members. Thereafter, for each 30 members, or major fraction thereof, units will be granted one more delegate. In all, the 72 local units have qualified for 497 delegates based on their March 1 annual, payroll deduction and lifetime membership totals.

In addition, the OREA President, Vice President, Past President, and the eight elected district directors will be official delegates, bringing the total potential delegates to 508. Non-elected members of the OREA Board of Directors, plus all members of Association committees, will not be delegates unless elected as a part of their local unit's allocation.

Separate Credentials and Rules committees, appointed by President Weldon Davis with the approval of the Board of Directors, will work out final operational details for the House of Delegates. Members of either committee may be delegates if elected as a part of their local unit's delegate allocation.

Local units are reminded to return lists of delegates and alternates to OREA by April 15. If schedules for unit meetings will prevent meeting the deadline, please contact Sharon Cox at OREA (405) 525-2230 or (800) 310-2230 toll-free. OREA will work with you to ensure your local unit's full representation.

The House of Delegates is expected to complete its business and reach adjournment around 2:45 p.m.

New District Directors Elected

In elections held recently in the Central and South Central districts, directors were elected to three-year terms beginning July 1. In the Central District, incumbent director Roy Cates (Canadian County) was re-elected without opposition. In the South Central District, Ada Hill (Garvin County) was elected over one opponent. Another election was slated for Friday, March 26, in the East Central District. As of press time for this newsletter, results from that election were unavailable.



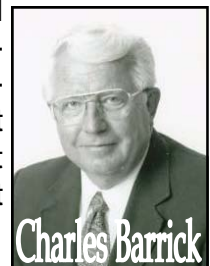
We look forward to Roy's and Ada's contributions of time and talent to the Central District, South Central District and the Board of Directors.



District directors serve as voting members on the OREA Board of Directors and as vital communications links to local unit leaders.

Charles Barrick, Theo Crawley Terms End

OREA thanks South Central District Director Charles Barrick for his three years of service as South Central District Director. He has been a great asset to OREA, but chose not to run for re-election.



OREA also thanks East Central District Director, Theo Crawley (Okfuskee County), for her many years of service to OREA in a variety of capacities, including serving as President. On June 30 she will complete her second consecutive three-year term as district director, and is therefore unable to run again due to term limits.



LifePlans, LLC™

FIVE THINGS EVERYONE SHOULD KNOW ABOUT IDENTITY THEFT

1. You're Only As Safe As Your Weakest Link.

The challenge in protecting your identity is that your personal information is everywhere. Even if you shred your private documents or use secure Web sites and strong passwords, what about everyone else who has your Social Security number -- like your doctor, dentist or the 17-year-old clerk handling your credit application at the electronics store? You may be doing everything right, but what about everyone else who has your information?

2. Once Your Social Security Number Is Out, It's Staying Out.

If your credit or debit card is stolen, you can replace it, but what about when non-changing information like your Social Security number is stolen? Identity thieves buy, sell and trade stolen information, using it over and over for years.

3. Anyone Can Be A Target.

Even the chairman of the Federal Reserve was one of the 9.9 million Americans who were victims of identity theft in 2008.

4. How Protected Are You?

Your credit card may be safeguarded but that won't help if thieves open new lines of credit. Credit monitoring will only alert you once something bad has already happened. It doesn't help prevent identity theft nor resolve problems once you've become a victim.

5. There Is Help.

LifeLock, the leader in identity theft protection, is available through your OREA membership for as little as \$8.99/month for individuals and \$15.99/month for couples. To sign up, visit www.oreadiscountplans.com or call North American Life Plans toll-free at 1-888-362-1214. Please call weekdays between 8:30 am and 5 pm.

~ Advertisement ~

Continued from Page 2... "It's a Free Country, But Let's Keep our Voice Strong"

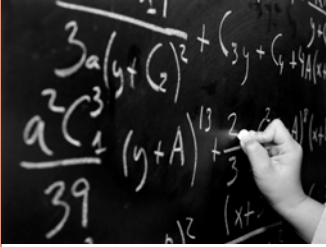
In recent years, OREA has elevated its profile in seeking to influence issues affecting retired educators, particularly by placing sharp focus on the unfair, unequal and unjustified cost-of-living benefits disparity between retired members of the Teachers' Retirement System and retirees of other state-sponsored pension plans. OREA, with the help of its 14,000 members, continues to press state legislators to correct this long-standing COLA inequity.

Working together, not alone, and speaking with one strong voice for the entire retired educator community, OREA is making progress toward fairer COLA treatment. Legislators are beginning to listen and show their understanding that the problem needs to be corrected. The task of achieving a fair and equal COLA is big, complicated, and costly, but OREA and its members are committed to achieving success. We are confident that only OREA has the resources, expertise, and staying power to get the job done.

The COLA issue is just one area where OREA is providing knowledgeable and responsible leadership. Your association has a well-defined comprehensive legislative program, highly qualified professional lobbyists in place, and is supported by hundreds of loyal and dedicated active members in all counties of the state.

Now is not the time to weaken the strong retired educator voice by splitting into different camps with possibly different objectives. Such a scenario would provide legislators all the reason they need to do nothing for us. Please help prevent that circumstance by continuing to give OREA your loyal and dedicated support through membership. OREA is the recognized voice for retired educators and will continue to be so long into the future, thanks to you.

Math Quiz: Does Fair and Equal COLA Really Matter?



For almost three years, you've heard from OREA that it's wrong for retired members of the Teachers' Retirement System to receive only 2% biennial COLAs (cost-of-living adjustments) when retirees in other state pension systems receive 4%. Like others, you might have considered the issue and asked what's the big deal? After all, the difference between a 2% and a 4% COLA really isn't that much anyway. Or is it?

If you care to do it, here is your math assignment. Take your choice of old math or new math, but calculate the dollar and cents impact on the average TRS annuitant receiving either a 2% or 4% COLA over a 20-year period of time.

So that everyone will have the chance to arrive at the same answer, let's assume the following: The average TRS annuity benefit was \$17,775 as of July 1, 2009. Beginning that date, if the legislature were to grant 2% COLAs every other year (even-numbered years starting July 1, 2010) for 20 years, what would be the total benefit for the average annuitant over that period of time? Once you've calculated the 2% total, do the same for 4%.

What would be the dollar and cents difference between the 20-year benefit for the average annuitant receiving a 2% COLA compared to a 4% COLA?

Once you've calculated the difference for the average annuitant, do the same for your own personal financial circumstance, starting with the benefit amount you were receiving on July 1, 2009. Remember that all calculations should be based on gross annual benefit (monthly gross x 12), without regard to factors such as state and/or federal tax withholding, health insurance premium deductions, etc.

Do the math on the average annuity benefit scenario and then send a letter, postcard or e-mail to Norman Cooper, OREA Executive Director, with your answer. His mailing address is: OREA, Attn: Norman Cooper, P. O. Box 18485, Oklahoma City, OK 73154. His e-mail address is ncooper@okea.org.

Does fair and equal COLA treatment for retired educators really matter?

OREA BOARD of Directors

President Weldon Davis (405) 495-1069	East Central Director Theo Crawley (918) 623-6736	Southeast Director Sharon McKeever (580) 933-7806	Government Relations Chair Lonnie Fuson (580) 355-0131
Vice President Elaine Dodd (918) 744-5830	North Central Director Clyde Pendergraft (580) 765-3809	South Central Director Charles Barrick (580) 332-0052	Finance Chair Matti Palluconi (918) 341-8279
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Central Director Roy Cates (405) 324-7751	Northwest Director Nancy Jewell (580) 233-4173	State Membership Chair Marilyn Davis (405) 495-1069	



MARCH 2 LOBBY DAY A HUGE SUCCESS

If attendance is among the criteria to determine an event's success, then the March 2 OREA legislative lobby day and luncheon at the state Capitol scored a near perfect "10." Approximately 400 OREA members, along with family and friends, made the trek to Oklahoma City to visit with legislators on behalf of the OREA legislative agenda.

Before meeting with lawmakers throughout the Capitol, many members ventured up to a fourth floor legislative committee hearing room to catch up on the latest developments from OREA professional lobbyists Terry Ingmire and Norman Cooper. Thereafter, in quick succession, member lobbyists packed the galleries of the House of Representatives and Senate for special recognition of their attendance, as well as to demonstrate the Association's strong presence.



Kay County Lobbyists with Rep. Dale Dewitt

While in the Senate, members witnessed an initial effort to

pass SB 1350, a bill aimed at guaranteeing fair and equal COLAs for retired educators. Although a minor flap over one lawmaker's proposal to restore the bill's title caused the measure to be laid over for later consideration, the bill managed to pass the Senate on a vote of 41-1 a week later. Upon clearing the Senate, SB 1350, by Don Barrington (R, Lawton) was sent to the House of Representatives.



OREA Lobbyists visiting with Senator Johnnie Crutchfield

After a full morning of visits with legislators in offices, hallways and in the lobbies outside House and Senate chambers, members and lawmakers sat down together for a delicious legislator and House-Senate staff appreciation luncheon buffet, compliments of OREA.

Despite the large turnout, the event was carried out seamlessly. Members handed over OREA legislative palm cards (outlining the Association's legislative goals) to all legislators with whom they met, and left behind yellow visitation cards for those they were unable to see. Making communication easier, members were identified by personalized name badges bearing the OREA logo. Advanced briefing materials had been mailed to participants the week before, but were augmented by an up-to-date briefing sheet the day of the event. Many members also enjoyed the shuttle bus transportation to and from the Capitol, provided by OREA.



Rep. Corey Holland with OREA Lobbyists

Although difficult to quantify the positive influence of the lobby day and luncheon toward eventual passage of key components of the OREA legislative agenda, there seemed to be strong general consensus that the day was worthwhile. Legislators learned more about the needs of retired educators, and OREA gained in strength and solidarity through the shared efforts of its members.



Tuesday and Wednesday Lobbying Continues

The end of the legislative session is in sight, but there is still a need for local unit representatives to participate in the Association's regular Tuesday-Wednesday lobbying program. Call the OREA office to schedule a contingent of members for lobbying at the Capitol. For further information, call OREA Executive Director Norman Cooper at 405.523.4371 or 800.310.2230 toll-free.

State Office Contact Info

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P.O. Box 18485 ❖ Oklahoma City, OK 73154
www.orea.org ❖ 405.525.2230 or 800.310.2230

Second Notice for Election of OREA President & Vice President

Second notice is hereby given to members regarding the election of a President and Vice President at the OREA Annual House of Delegates on Friday, May 14, in Stillwater. Candidates for either office must be members in good standing of both OREA and a local unit. The filing deadline to become a candidate for either office is Wednesday, May 5. Members interested in becoming candidates for either President or Vice President are advised to contact Sharon Cox at OREA (405.523.4373 or 800.310.2230 toll-free) for more information on election procedures.

The new President and Vice President will each begin two-year terms of office on July 1.

The **OREA News Bulletin** is published four times yearly in January, April, July and October as the official newsletter of the Oklahoma Retired Educators Association. OREA Headquarters are located at 323 E. Madison, Oklahoma City, OK 73105. The opinions expressed in this newsletter do not necessarily reflect the official positions of the organization. Questions, comments, or suggestions about the **News Bulletin** are welcome, and may be communicated to Norman Cooper, Executive Director, P. O. Box 18485, Oklahoma City, OK 73154.

Oklahoma Retired Educators Association
P.O. Box 18485
Oklahoma City, OK 73154

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