

# THE PERI NEWSLETTER

Issued by PUBLIC EMPLOYEE RETIREES, INC.

## JULY - AUGUST - SEPTEMBER 2002

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### Legislative Report *By John Gilchrist*

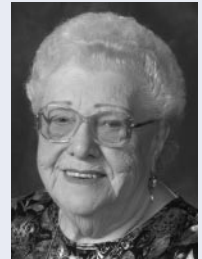
Compared to the past two years, this legislative year has not been as demanding. It seems that over the past few years, we have cleared our plate of a number of legislative issues that had been pending for some time. Having said this, there still are a number of legislative proposals pending before the Ohio General Assembly that we are following. They include:

Two legislative proposals—one introduced in the House and one in the Senate—that would allow for a partial lump sum payment when one retires. (This program would not affect or be available to those who are currently retired.) This program has been labeled the PLOP program. More specifically these companion bills would create in PERS, STRS, and SERS the option for those about to retire of receiving retirement benefits as a partial lump-sum followed by a reduced monthly allowance. At the time of retirement an individual could make application for a lump sum amount of not less than six times the monthly amount, nor more than 36 times that amount. The total amount paid as a lump sum and a monthly benefit must be the actuarial equivalent of the amount that would have been paid had the lump sum not been selected. In short, the cost for this program would be fiscally neutral for the retirement systems. Since we have determined that these Bills, as proposed, would not harm our retirement system, we will simply keep our eye on their progress through the legislature.

Another proposal, House Bill 404, would allow certain county and independent agricultural society employees to join PERS. There has been much discussion on this issue at the State House. Many wonder if these individuals are truly public employees. Allowing them to participate in PERS could jeopardize PERS' standing with the IRS. In addition, if these individuals are allowed to participate, there will certainly be others who will come forward to seek participation in PERS. At this point in the process, we are monitoring the activities.

House Bill 528 proposes that up to \$10,000 in state, federal, and military retirement benefits be exempt from the

*Legislative Report (Continued on page 2)*



### A Message From Your President

As I look back over the past three years, I continue to be so thankful for the men and women who have gotten involved in watching over legislative actions that affect the operation of the retirement system that supervises our pension fund and healthcare benefits.

Our membership has grown from a handful in 1948 to well over 50,000 in 2002. Our volunteer leadership has grown from 4 people in Columbus in 1948 to 493 throughout the state in 2002. These figures do not count the many others who volunteer their time on committees and provide goodies for the chapter meetings.

PERI has gained the respect of Ohio's legislators and the administrators of PERS, because we take the time to educate ourselves on each issue and approach each of them with logic and not emotionalism.

One of the main reasons we have enjoyed such legislative success, is our systematic approach to building leadership and remembering our history. Another reason is that we bring to the table a statewide perspective on all issues.

*(Continued on page 2)*

(A Message From Your President Continued From Page 1)

As I look to the future, I see wonderful things in store. We opened the door to expanded education for our Chapter Officers this year with 4 regional meeting across the state.

We had a special day to educate our District Legislative Chairs on our history and current legislative concerns. And we have held several educational meetings for our district representatives throughout the year.

In this, my last letter as president, I want to challenge those of you who have recently retired to not be afraid of getting more involved. Please do not be lulled to sleep, thinking our retirement system is out of danger and everything will always be the same as it is today. The state legislature will always be under pressure to change the rules so that outside interest can get their hand on our retirement funds.

Witness the move toward defined contributions, and the efforts to remove money from the Retirement System and place it into a special Venture Capital fund.

We need you younger, anyone under 70, men and women to make yourselves available for chapter, district, and state leadership so that we can continue our growth and development with knowledgeable and effective retirees.

Well, that is about it. Keep up the good work and thank you all for being so kind to my husband, Richard, and me when we visited your area.

PS: Oh, by the way! You are not ride of me yet. I will still be on the Board as the Immediate Past President.

### Legislative Report (Continued from page 1)

personal income tax. As you may recall, this concept has been introduced into the General Assembly a number of times in the past. Although PERI supports this provision, we realize that it is doubtful that it will pass because of the budget crunch here in Ohio and Washington, D.C.. The bill would cost the state alone millions in lost revenues.

Another legislative proposal, Senate Bill 238, would reduce the retirement benefits provided to any public official who is found to have accepted bribes in the course of his duties. We will continue to watch developments on this proposal.

Lastly, I would like to inform you that the Ohio Department of Aging has launched a long-term care guide website. Information on this website will allow Ohioans to view a nursing home's compliance record, services, costs, and satisfaction surveys among other things. The site is [www.LTCOHIO.org](http://www.LTCOHIO.org). Visitors to the site can tailor their search to meet their needs by choosing homes in a certain area of the state, by facility name, and by services provided.

#### William J. (Bill) Kuhner Jr.

Shortly after retiring, Bill joined PERI and became active in his local chapter in Ross County. He has served his chapter in various positions including its Presidency. In 1992 the members of District 7 elected him to represent them on the State PERI Board of Directors. In 1999 he was elected as our 3rd Vice President, and in 2001 and 2002 as our 1<sup>st</sup> Vice President. Bill has gained a real insight to the association through his service on the Audit, Finance, Program, Legislative, Membership/ Education, and Nominating committees. He is currently the Chairman of the Constitutional Review Committee.

William J. (Bill) Kuhner, Jr. went to Ohio University where he received his bachelor's degree in Education in 1947. Upon graduation, Bill worked with the Ohio Department of Transportation before moving on to the Ohio Bureau of Employment Services where he retired in 1988 with 42 years of service credit.



#### Bill Cook

Mr. Cook served in the United States Army during the Korean Conflict. In 1975 he was employed as director of the Comprehensive Employment & Training Act (CETA) in Crawford County. Later, he moved to the Auditor's office and then the Galion City Schools, where he retired in 1996.

Bill has been busy during his retirement years. In addition to his work for PERI, he holds leadership positions in his church and several other organizations.

In 1997 Mr. Cook, an active member of the Crawford County Chapter, was elected by the members of District 5 to be their Representative on the PERI Board of Directors. During his tenure on the Board, Bill has served on the Audit, Legislative, Membership, Chapter Education, Program and Nominating Committees. He is currently serving as PERI's 3rd Vice-President.

Bill and his wife of 47 years, Shirley, have two children and 4 grandchildren.



#### Evelyn George

Evelyn George retired in 1993 and immediately joined PERI and the Shelby County Chapter. Shortly thereafter, she was elected to the position of President. In 1998 she was elected by the members of

District 2 to represent them on the board of directors. Currently, Evelyn chairs the finance committee and co-chairs the legislative committee. She previously served as program chair for 2000 and 2001.

Evelyn, a native of Putnam County, began working for the Auglaize County Health Department in 1973. She took computer and accounting courses at Apollo, Wright State, and the Ohio State University Lima Branch. Serving as administration assistant, she assisted in the computerization of the department. Her duties included fiscal management of the local department as well as financial reporting of various grants.

With her working background and all out commitment to protecting our retirement funds PERS, Evelyn will make a fine Secretary / Treasurer for PERI.



## Where are the Candidates?

By William I. Winegarner, Administrator

Remember the old advertisement, "Where's The Beef?" From time to time we hear a similar question, "Why isn't every position contested?"

The Constitution Committee spent three full years in developing our constitution. The Committee was comprised of five Board members and one person from each of Ohio's 11 districts that was not a member of the Board. Once they had the constitution in final form, prior to being voted upon and approved at the 1995 Annual Meeting, it was sent out to all PERI members for their review.

One of the requirements in our constitution is: in order to be eligible for one of the state officer positions, one has to be on the Board for a minimum of one year (President 2 years). The Constitutional Committee felt that it required experienced leadership to keep our association on track.

The more competition we have for leadership positions, the better our association will be.

However, competition starts at the local level. More men and women need to run for chapter officer positions. More men and women need to run for District Legislative Chair and District Representative positions.

When our members see the need, will have more people eligible to run for the officer positions.

Chairman Speakman expressed his appreciation for the fine job done by this year's committee. In addition to Chairman Speakman, others representing the board were Ellsworth Szkudlarek and Floyd Smith. Representing the districts were Albinus Miller from District 2, Noel Stephenson from District 4, Edgar Harrison from District 6, Marjorie Belville from District 8, and Lloyd Hanshue from District 10.

### Joseph C. Speakman

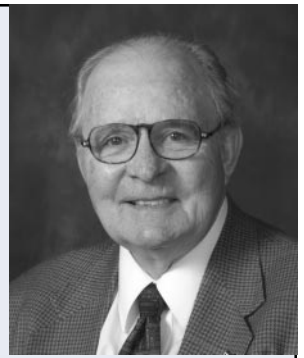
Retire in 1986 from the Ohio Environmental Protection Agency, Office of Land Pollution Control. Employed several years with the Ohio Department of Health in the Bureau of Environmental health. Served thirty-four years in the Ohio Local and State Government.

Graduate of Ashland University, Ashland, Ohio with a bachelor of arts degree in biology and chemistry. Attended graduate studies at the University of Minnesota School of Public Health. Retain membership in several professional environmental and public health organizations.

Veteran of World War II having served three years in the U.S. Navy and have membership in the American Legion and Veteran of Foreign Wars.

Served six years on the PERI Board of Directors as representative of District 6. Served as president of Franklin County Chapter # 1 for 4 years.

Married to wife, Peggy. We have three adult children and four grandchildren.



### Jack Wymer 2002

Jack Wymer joined PERI in 1994, serving in his local chapter as Secretary, then two years as its President. On the District level, Jack served one year as legislative Chairman, before being twice elected as District 1's Representative. As a member of the state Board, Jack has served on the Legislative, Membership, and Program Committees, as well as chairing the 2001 Nominating Committee, and the 2002 Audit Committee. Jack continues to be a vital part of his local chapter, serving as its Vice-President.

After retiring from the USAF, Jack was employed by the Toledo Mental Health Center as a Training Officer. During this time he earned his BA in Public Administration at the University of Toledo. Afterwards, he was promoted to Program Administrator and the Director of Admissions.

Jack Wymer and his wife Marilyn, who is also very active in PERI, have three grown sons, and eight grandchildren.



### Donald F. Moyer

When Don retired, he became an active member in his local Muskingum County chapter. He was elected as District 8 Representative in 1996, 3<sup>rd</sup> Vice President in 2001 and 2<sup>nd</sup> Vice President in 2002. Under Don's leadership, District 8 grew in membership winning the awards for greatest percentage of growth and greatest percentage of chapter members. As a Board member, Don has been on various committees including: Finance, Constitution, and has chaired the Nominating, Audit, and Chapter/Education Committees. This year, Don has lead the way in educating our chapter presidents by bringing PERI, PERS, and legislative leaders out to their regional areas.

Don's Public service was as a member of the Muskingum County Board of Elections. Don and his wife, Evelyn, reside in Zanesville where and attended Muskingum Area Technical College and Ohio University. A past member of the Naval Reserve, Don keeps busy with his various business enterprises.



### Floyd C. Smith

Floyd became a Crawford County Deputy Sheriff and in 1953 and was elected Sheriff in 1969. He served as President of the Buckeye State Sheriff's Association in 1980. He retired in 1981 with 34 years in the PERS system. He has been a life member of PERI since that time. Floyd married Donna B. Coutts on June 13, 1948 and they are parents of five daughters, thirteen grandchildren and thirteen great-grandchildren.

He served as 1st President of the Crawford County Chapter and continues to remain very active. He was appointed to the position of District 5 Representative and was 3<sup>rd</sup> Vice President in 1998 and 99. H had to withdraw from active PERI service in 2000 due to a medical condition, but was reelected to District 5 Representative in 2002. He has served on the following committees: Audit, Finance, Legislative, Program, Chapter, Nominating, and Constitution and By Laws.



## PERI Roundup

### District 3

John Adams, past president of PERI Chapter 6 in Dayton, was recently honored by the President's Club at its seventeenth annual "Outstanding Service Club Members' Breakfast." Adams was among 31 Dayton area civic leaders honored for their commitment to their communities and organizations.

### District 6

Chapter officers and members of District # 6 met on June 1 1,2002, at the MCL Cafeteria in Westerville for their annual meeting. John Maurer, former member of the PERS Board of Directors was the quest speaker. Mr. Maurer discussed several topics pertaining to the PERS Board of Directors. Also in attendance was Mrs. Lucille Critchfield, P.E.R.I. President. Mrs. Critchfield spoke briefly on some of the P.E.R.I. activities.

An election was conducted to select a member to serve on the PERI Board of Directors to represent District 6. Mrs. Joan Grube, a member of Licking County Chapter 23, was elected to be District Representative for a two-year term beginning in September, 2002. District officers elected to work with Mrs. Grube are: Art Bartfay, President, Franklin County, Chapter 1; Margaret Remy, Vice President, Pickaway County, Chapter 41; Norma Riggs, Secretary, Union County, Chapter 39; Joe Speakman, Treasurer, Franklin County, Chapter 1.

The next meeting for District 6 will be held on October 8, 2002, at 1:00pm at the MCL Cafeteria in Westerville.

### District 8

PERI's Hocking County Chapter 45 celebrated the chapter's 15th anniversary on May 16 in Logan, Ohio. Pictured at the 2002 officer installation meeting was (seated l. to r.): Marjorie Belville, chapter president and Vera Lindsey, secretary; and (standing l. to r.): Rev.



*Hocking Chapter Celebrates 15th Anniversary*

Paul Johnson, chapter chaplain; Bob Polland, District 8 representative; Leonard Myers, chapter vice president; Tom Sherman, PERS legislative Affairs Officer; and Don Moyer, PERI 2nd vice president. A total of 48 members attended the Logan meeting.

### District 10

Lorain County Chapter 83 Membership Hits 400!!

Congratulations to Membership Chairman, Chuck Bukovec, for reaching his goal of 400 members by June of 2002. Now, "Big Chuck" is looking for new retirees who will join both the state and our local chapter to help him reach a new goal.

In the Chapter records, in 1989 the group was organized with nine members and here is how that membership grew to the total of 400 in 2002.

1990 - 54    1991 - 62    1995 - 78    1996 - 108    1998 - 214  
1999 - 302    2000 - 330    2001 - 363    2002 - 400

By the way, it is easy to spot Chuck's truck: it's the one covered with bumper stickers and posters with our logo, chapter data, and Chuck's phone number in every window. What's his next goal? 450? He will do it!

### District 11

Dr. Lori Herpin was the featured speaker at the PERI Chapter 35 meeting in Ashtabula on July 12 at the Ashtabula Senior Center. She spoke on foot care and other health issues. Scheduled speakers and topics for upcoming meetings include: August 2 - Ed Sompi on Emergency Management; September 6 - Dr. William Campbell on Eye Care Missionary Work in Poland; October 4 - Christy Miller, Aetna and Mike Mussell from Medical Mutual; November 1 - Ohio Congressman Steven C. LaTourette on Social Security.

## PERI OFFICER TRAINING

### Statewide PERI Officer Training Sessions Get High Marks from Attendees

Don Moyer, PERI second vice president and chairman of the organization's Chapter & Education Committee, successfully conducted four statewide meetings during the month of May to educate presidents and vice presidents on the activities and functions of PERI's 11 districts.



*Former Ohio Senator Harry Meshel, left, with Don Moyer.*

Formal training sessions were held in Smithville, Athens, Xenia and Findlay with more than 156 PERI presidents and vice presidents attending



*John Gilchrist*

the sessions from all corners of Ohio. A total of 67 chapters were represented in the sessions. Speakers included PERS executives Lori Hacking and Tom Sherman and PERI Legislative Agent John Gilchrist along with Moyer and other active PERI representatives.



*Tom Sherman*



*A large crowd in Xenia listen to a presentation.*

"These training sessions will go a long way in developing future leadership and achieving future growth for the PERI organization in the years ahead," explained Moyer. "Those PERI leaders who were in attendance at these sessions are now armed with the information and leadership objectives necessary to help make them successful in each of their chapters throughout the state."



*Lori Hacking*

## PERI PLANS 2002 ANNUAL MEETING

**PERI's 2002 Annual Meeting will be held on Tuesday, September 24, 2002** at the Villa Milano Conference Center in Columbus.

Registration will be from 9 to 9:45 a.m. Coffee cake, coffee, and tea will be available during that time.

The business meeting will start at 10 a.m. and will feature reports from the Administrator, Treasurer, Legislative Counsel, and President. The Nominating Chairmen will announce the new Officers for the remainder of 2001 through the Annual Meeting in 2002. To complete the program we will have Mr. Neil Toth, PERS Investment Officer; and Mrs. Laurie Hacking, PERS Executive Director as our keynote speakers.

Before and after the business meeting, we will have representatives from PERS, Medicare, Medical Mutual, Aetna, Merck-Medco, Aetna Dental, Social Security, Ohio Department of Aging, Ohio Consumers-Counsel, and the Ohio Division of Insurance located at service tables to answer your questions.

There will be a luncheon after the business meeting where you can enjoy fellowship with your fellow retirees. The meal choices this year will be Honey Mustard Chicken or Broiled Orange Roughy, served with appropriate accompaniments and desert.

Come with great expectation for education, direct information, and a wonderful time.

### REGISTRATION INFORMATION

Because meals have to be ordered and paid for in advance, we need to receive your written application and payment in full prior to 5 P.M., Friday, September 6, 2002. Tickets for registration and the Luncheon are \$20 per person. Tickets for registration only are \$10 per person. Please keep in mind that we have to pay whether you attend or not, so there can be no refunds.

If you are making reservations for more than one person, please list each person's name separately, along with their meal choice.

Those registering for the meeting only, may participate in the continental breakfast and will be seated at tables in a special balcony section that is NOT set up for meal service.

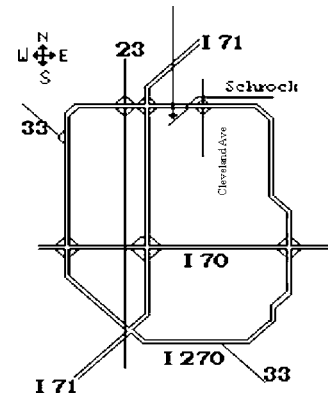
Annual Meeting packet will be at the Registration table when you arrive.

**Please do not send your registration in the ballot envelope.** The ballots are not opened until shortly before the meeting and there would be no time to process your registration.



### PERI ANNUAL MEETING MAP

Villa Milano 614-882-2058  
1630 Schrock Road



Take Cleveland Avenue North off of I-270. Go to the first intersection, which is Schrock Road, and turn left. Follow Schrock Road to 1630. Approximately 2 miles on the North(right) side of the Street.

Annual Meeting

Tuesday, September 24, 2002  
Registration 9:00 to 10:00 A.M.  
Business Meeting 10:00 A.M. to Noon  
Luncheon: 12:30 P.M. to 3:00 P.M.

#### Registration and Luncheon Reservations for the PERI 2002 Annual Meeting

first name	initial	last name	Chicken	Fish
first name	initial	last name	Chicken	Fish
first name	initial	last name	Chicken	Fish
first name	initial	last name	Chicken	Fish

**Please Circle Meal**

County \_\_\_\_\_

Number of Registrations with out meals: \_\_\_\_\_ x \$10.00= \$ \_\_\_\_\_

Number of Registrations with meals: \_\_\_\_\_ x \$20.00= \$ \_\_\_\_\_

*Make check payable to PERI and mail to arrive no later than Friday, September 6, 2002.*

**“DO NOT MAIL WITH THE BALLOT”** Your packets will be at the RegistrationDesk.

## How to Avoid Identity Theft

PERI encourages its members to safeguard themselves from: Identity theft. An imposter can misuse personal identity information to commit fraud or theft, which can include opening fraudulent credit card accounts, securing deposits on cars and housing, and even robbing retirement savings accounts. By following these tips you can decrease your chances of becoming a criminal's next victim.

- Never give out personal information on the telephone.
- Tear up or shred all documents containing personal information, including unwanted credit card solicitations.
- Mail sensitive letters at the post office instead of your mailbox.
- Carefully review all billing statements for unauthorized charges and report them immediately.
- Use Direct Deposit when ever possible.
- Use Direct Pay for standard monthly bills.
- It is available to order your credit report once a year from a national credit bureau and review it for inaccuracies and fraudulent use.

## PUBLIC EMPLOYEE RETIREES, INC.

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Lucille Critchfield ..... President  
William J. Kuhner, Jr. .... 1<sup>st</sup> Vice President  
Donald Moyer ..... 2<sup>nd</sup> Vice President  
Bill Cook ..... 3<sup>rd</sup> Vice President  
Mary McDowell ..... Secretary/Treasurer  
William E. Covert ..... Past President  
William I Winegarner ..... Administrator  
John Gilchrist ..... Legislative Agent  
Jim Fette ..... Editor

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Defiance, Fulton, Henry, Lucas, Ottawa, Sandusky, Williams, Wood.  
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Ellsworth Szkudlarek 937-833-4675  
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Ramon Mick 513-867-1199  
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Floyd Smith 419-562-1453  
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Joe Speakman 614-868-1234  
Delaware, Fairfield, Fayette, Franklin, Licking, Madison, Pickaway, Union.  
Frank Vaughan 740-992-7334  
Gallia, Jackson, Lawrence, Meigs, Pike, Ross, Scioto, Vinton.  
Bob Polland 740-452-5318  
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Becky Sommerville 330-876-8634  
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