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## FROM ORTA'S NEW PRESIDENT



2019-2020 ORTA President,  
Gale Adkins

Greetings to all ORTA members from your new President -Gale C. Adkins.

I hope that all of you have had a very enjoyable Summer. It is hard to believe that many schools are already in session in early August and Fall is just around the corner. As a former teacher and administrator, I remember the excitement and anxiety in getting the school year started. I am feeling the same as the new administrative year at ORTA is getting started. I am sure that it will be good year! A little bit about my background....

- I was born and raised in Montgomery County, Ohio. My father was a teacher and administrator in four different school districts in Ohio.
- I graduated from New Lebanon-Dixie High School in 1969.
- From there I attended Ohio University in Athens, Ohio from 1969-1973. I did my student teaching experience in Jackson, Ohio and graduated with a Bachelor of Science Degree in Education in December of 1973.

*\*SIDE NOTE: – Also met my future wife (**Janet White-Adkins**) while she was student teaching in Jackson, at the same time. We married in 1975, in Logan, Ohio, and we were blessed with 3 children (now adults and married) who have provided us with five wonderful grandchildren!!*

After graduation from college, I was a substitute teacher and worked part time at a YMCA in Xenia, Ohio for about four months. I then became a Youth Director and Physical Director at this YMCA for two years.

- I attended the University of Dayton from 1978 to 1980 where I obtained my Masters Degree in School Administration.
- I became an Assistant Junior High School Principal in 1985, then Principal in 1988. I retired from that position in 2005. That's when I joined the **Greene County Retired Teachers Association** and became a Life Member.
- After becoming an STRS member, I became a Student Teacher Advisor at Wright State University in Fairborn, OH from 2005-2009.
- As a member of the **Greene County Retired Teachers Association**, I have been a Membership Chair, Program Chair, Vice President, and President.
- My community involvement has consisted of being a Xenia Kiwanis club member for 25 years, having served as a Key Club Advisor while teaching at Xenia High School and Kiwanis Club President in 1995-96. Former member of the Greene County Adult Concert Band and currently with the Community Christmas Band that provides a free concert each year during the holidays.

*(con'd on next page)*

## My Goals for the administrative year include:

- To support the continuation of ORTA's Strategic Plan implemented in 2018.
- To attend as many Regional and Chapter meetings as possible in order become more familiar with our chapters within all five regions of this great state of Ohio.
- To encourage support of ORTA's efforts to build and support membership growth.
- To work with Chapters and ORTA liaisons to ensure that ORTA meets the needs of its membership. Our strength is dependent upon numbers of members who are willing to advocate for change.
- To keep insisting that STRS bring back the COLA! Sooner, better than later!!

## My "Shout out"

In the years leading up this occasion I have been blessed to be associated with and have learned a lot from many of our past leaders who have been inspirational and great examples of what ORTA leadership should be like: Bee Lehner, Randy Overbeck, Darlene Ruzicka, Linda Beaver, Don Ullman, Dave Gynn and Pat Bateman. I thank them and the many people who have volunteered to be on various ORTA committees and have worked very hard to give this organization meaningful and purposeful direction.

To our current office staff, that continues to work hard to keep operations running smoothly, consisting of **Executive Director - Dr. Robin Rayfield; Publication/Communications Coordinator – Alissa Burton;** and **Administrative Assistant / Membership Coordinator – Mia McLean.** Keep up the good work!

I am very humbled to be a part of an organization that has so many dedicated and energetic people who volunteer their time to serve the collective interests of all retired educators across the state of Ohio.

I would like to encourage more members to become involved with their local chapters and with ORTA to help fill leadership roles— we need you, step up NOW!

Looking forward to a new ORTA year, and leading our organization into 2020!

Best Regards,  
Gale C. Adkins



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# WE'VE MOVED!



The ORTA office has officially moved! Please take note of our new address:

***250 E. Wilson Bridge Road  
Suite 150  
Worthington, Ohio 43085***

## TIME TO RENEW?

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

\_\_\_\_\_

Current Address: \_\_\_\_\_  
Street/Apt./Suite #

\_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Amount Enclosed: \_\_\_\_\_

Current E-Mail: \_\_\_\_\_

\_\_\_\_\_

Year of Retirement: \_\_\_\_\_

I would like to become a Life Member of ORTA (a \$500 one-time payment)

***Thank you!***

Need to renew your dues? Just fill out this form and send in your payment to:

**250 East Wilson Bridge Road  
Ste. 150  
c/o Mia McLean, Membership  
Worthington, OH 43085**



**\*\*Remember, the date we process your payment is your new due date for the following year (i.e. 8/18/19, new due date is 8/18/20). If you pay your ORTA dues to your local chapter, your payment is applied upon receipt to our office.**

# FROM OUR EXECUTIVE DIRECTOR



Dr. Robin Rayfield, ORTA  
Executive Director

Greetings ORTA Members!

## Changes in ORTA Leadership

With the beginning of the new ORTA year August 1, 2019 the membership of the ORTA Executive Committee changed. **Kara Mendenhall** begins her term as the President Elect of ORTA. Over the course of 2019 Kara will serve in this leadership role with the new President, **Gale Adkins** taking over as ORTA's leader. **Bee Lehner** will move from the President's post to the position of Past President. ORTA's Executive Committee says goodbye to **Randy Overbeck** who served a three-year term on the Executive Committee. Rest assured the ORTA leadership positions are in good hands with Gale, Kara, and Bee.

## ORTA Moves to a New Location

The ORTA offices moved to a new location on August 12, 2019. Our new address is 250 East Wilson Bridge Road Suite 150, Worthington, Ohio 43085. Although the move was only 2.5 miles from our present location, ORTA will save significant money on rent. The savings amount to approximately \$14,000 per year on rent! Our website address and phone numbers do not change, so members can reach ORTA staff at the current numbers and email addresses.

## ORTA Regional Updates

The ORTA Regional Liaisons have been busy planning and facilitating Regional meetings for Local Chapter Officers.

**On May 20th** the Northeast Region Liaisons facilitated a meeting of Local Chapter officers. The information shared included updates from AMBA, ideas for increasing membership, and opportunities to share information critical to local chapter success.

**On August 21, 2019** Central Liaisons organized a meeting for Local Chapters in the Central Region. On August 29 the Liaisons from the Southeast region have planned a meeting for leaders in the southernmost area of Ohio.

**On September 5th** the Southeast Region will host a meeting for Local Leaders in the northern counties of Southeast Ohio.

**On September 25th** local Leaders from Northwest Ohio will meet with their Regional Liaisons in Findlay Ohio.

All the Regional meetings are open to all ORTA members. Please contact the ORTA offices if you would like to attend one of these meetings so we can plan for the lunch.

## STRS Update

The STRS Board did not meet in July, so there is little to report on this front. ORTA continues to urge the STRS Board of Trustees to address the loss of COLA and to find ways to help the most vulnerable of our retired colleagues. I know that many of you are frustrated and disappointed that 'you are not receiving what you were promised'. ORTA has met with leaders at STRS and the Ohio Legislative body to find a solution to this situation. The STRS Board of Trustees did meet on August 15. The investment report indicated that the STRS people involved with managing our retirement funds were 'on target' with the assumed return rate of return on our funds. At the meeting our assets were reported as \$78.9 billion at the fiscal year end. This is up approximately \$1.1 billion. In another section of this ORTA news I have included a short report to ORTA members on the current status of ORTA.

Regards,

Dr. Robin Rayfield, ORTA Executive Director

# MEET ORTA'S 2020 PRESIDENT-ELECT



Kara Mendenhall,  
2020 ORTA President-Elect

***“Hello ORTA members!***

***My name is Kara Mendenhall and it is my pleasure to be addressing you as the new President-elect of the Ohio Retired Teachers Association! I am a native of Green Township, Summit County, where I attended Green Local Schools. As the daughter and sister of teachers, I have been impacted by educators my whole life. I am a graduate of Capital University (class of ‘81) and have worked both in the Ohio Legislature (17 years) and in public education (14 years). I still substitute regularly in Fairfield County.***

***I became secretary of the Fairfield County chapter of ORTA in 2013, soon after my retirement from Amanda-Clearcreek Local Schools. I still serve as secretary and web-master in Fairfield County and was elected District Director and then Central Regional Liaison with the reorganization of the ORTA leadership.***

***My participation on the ORTA Membership Committee and the Strategic Planning Committee have given me insight into the needs of ORTA and some of the issues all local chapters face. I look forward to helping Gale Adkins in his term as president and learning all I can from his experience in ORTA. I also look forward to meeting more of our members throughout the state and listening to their ideas and concerns. I hope this is a growing period for our organization and that we can strengthen our voice in Ohio.”***

We are excited to have Kara on our Executive Board and we look forward to her leadership!

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## A NOTE FROM ORTA PUBLICATIONS

Dear ORTA Readers,

Thank you so much for your patience with our delay in publishing this newsletter. As you have read, we have moved offices and we have finally settled in nicely. If you have sent any mail (such as items to be published) to our prior address, we have had everything forwarded correctly. Anything that was submitted for the newsletter in late June, throughout July and early August we have published here.

We look forward to continue sending out the monthly e-newsletter, and sharing your chapter stories!

Warm Regards,

A handwritten signature in cursive script that reads "Alissa".

Alissa A. Burton | ORTA Publications

# A BROWN CO. SUMMER

The **Brown Co. Retired Teachers Association** met in June to award a scholarship and also reviewed their traffic safety knowledge with the Brown County 4-H Carteens and the Ohio Highway Partol.

The **Tomi Stout** scholarship went to Chris Luke-mire, a **Western Brown Graduate**. Congratulations to Chris!

To learn more about the Brown Co. chapter, please visit their [website](#).



Above: Members interact with the presentation



Above: Thanks to the State Highway Patrol for joining Brown Co.!



Above: Tomi Stout scholarship recipient to Chris Lukemire

# PICKAWAY CO. LATEST NEWS

The **Pickaway Co. Retired Teachers Association** met on June 12, 2019. Members generously donated \$92.00 and 100+ nonperishable food items for the **Pickaway Co. Emergency Clearinghouse**. At that same meeting, members heard **Wendy Hux** speak on the **Volunteer Guardian Program** sponsored by the **Central Ohio Area Agency on Aging**. A special thank you to world-famous musician **Tony Ellis** and his wife **Louise Adkins** for attending the PCRTA annual summer picnic on August 14th. PCRTA also awarded its 2019 Educational Grants to two Logan Elm High School graduates: congratulations to Shelby and Rachel, both studying education! An abundance of new school supplies were brought by PCRTA members to donate to Logan Elm Schools, our featured school this year. To learn more about the Pickaway county chapter, please visit their [website](#).



Above: Wendy Hux, of the Volunteer Guardian Program



Above: Shelby and Rachel receive the 2019 PCRTA Educational Grants



Above: Tony Ellis and Louise Adkins

# GETTING CAUGHT UP WITH GALLIA CO.

The Gallia County Retired Teachers met at the Corral at Buckeye Hills Career Center (BHCC) at noon on April 11. **Patsy Schuldt** led the Pledge of Allegiance to the flag and the blessing was given by Jack James.

President **Gail Belville** introduced **Jamie Nash**, Superintendent of BHCC. He emphasized that career technical education is the pathway to success for many high school students. Goals of BHCC include: identifying gaps, striving for a drug free school population, and improving attendance. After Mr. Nash's presentation, a delicious meal was served by the Culinary Arts Class of BHCC.



ORTA representative Karen Butt, President Gail Belville, Vice President Karen Polcyn, Treasurer Jack James and Secretary Chris Williams

Guest **Karen Butt**, liaison for Ohio Retired Teachers in Southern Ohio installed the officers for the organization for 2019-2020 as follows: **President – Gail Belville; Vice President – Karen Polcyn; Treasurer – Jack James; and, Secretary – Chris Williams.** Ms. Butt informed the group that **Don Baker** will be taking the Southeastern Ohio liaison position beginning August of this year. She encouraged the group to continue to increase membership and to work together to stay an active group.

The secretary and treasurer both gave their reports. These were both approved by the membership. **Dal- lie Forgey** was recognized for having a March birthday. A sympathy card was sent to the family of **Judy Burdell**. There was no old business. Under new business the membership voted to award a scholarship to a qualifying senior at the **Ohio Valley Christian School in addition to Gallia Academy, River Valley, and South Gallia High Schools.**

**The Ohio Valley Bank** donated desk calendars and other “goodies”. The OVB door prize was won by **Cindy Wilson**. There were many raffle winners. Members are encouraged to continue to bring donations for the raffle to raise money for the newsletter. Donations are always accepted at each meeting for the scholarship fund and community service project, the Snack Pack/Back Pack Program.

The chapter also met on June 13 at First Baptist Church in Gallipolis. Youth pastor **Nathan Dupont** led the group in an invocation and President **Gail Belville** led the Pledge of Allegiance to the flag prior to everyone enjoying a potluck luncheon. With Flag Day being the next day, the tables were decorated in a red, white and blue patriotic theme by **Nancy Hood**.

*(con'd on next page)*

**(Gallia Co. con'd)**

Retired Teacher **Peggy Tope Davenport**, on behalf of Tope's Furniture Galleries, prepared summer-themed table favors for all. A big thanks to both of these ladies and **Tope's Furniture Galleries**. The secretary's report was read by **Chris Williams** and the treasurer's report was given by **Jack James**. Both were approved by the membership. May birthdays recognized: **Lorna Nomina, Jean Meek, and Lynn Arnott**. **Nancy Hood** was recognized for having a June birthday. A "thinking of you/get well" card was mailed to **Fannie & Tom Metcalf** and sympathy cards were mailed to the Grimm and Powell families.

The Scholarship Committee comprised of Chairman **Letty Willis** and members **Nancy Hood** and **Beth James** presented the recipients of the 2019 scholarships. They were: (1) **Justin McClelland**, son of Jared and Jennifer McClelland, is a recent graduate of GAHS. He plans to attend Capitol University in the fall to major in Intervention Education; (2) **Skylar Jones**, daughter of Eric and Chasity Baker, is a recent graduate of RVHS. She plans to attend Morehead State University in the fall to major in Agricultural Education; and, (3) **Nicholas Hicks**, son of Corrina Conley, is a recent graduate of SGHS but he was unable to attend. Recent teacher retirees were invited to the meeting. **Helenlu Morgan** accepted the invitation and was recognized and congratulated on her recent retirement from principal at Washington Elementary.



Justin McClelland and Skylar Jones

**Tope's Furniture Galleries** and **Acquisitions Fine Jewelry** each donated a door prize for the meeting. The lucky recipient of the framed **Gallipolis City Park Bandstand** print was **Letty Willis** and the necklace was won by **Gail Belville**. These door prize donations from both businesses were greatly appreciated. Raffle winners were numerous and donations for this from the membership are always welcome as the proceeds go to help fund the newsletter.

Donations for the scholarship fund and our community service Snack Pack Back Pack program are collected at each meeting and are also appreciated. To learn more about the Gallia Co. chapter, please visit their [website](#).



Jared McClelland, Justin McClelland, Skylar Jones and Chasity Baker



Jared McClelland, Beth James, Letty Willis, Nancy Hood, President Gail Belville, and Skylar Jones

## AS HEARD IN HARDIN CO.

**Hardin Co. Retired Teacher Association** met on June 21, 2019 for a year end luncheon at Walnut Grove United Methodist Church near Kenton, OH. An **Evelyn Lotz Scholarship** of \$500 was awarded to **Dustin Scott** by **Pres. Sandy Moore**. He is an Intervention Specialist of Grades 7-10 at Ridgemont Local School, and he is furthering his education.



Above:  
\$500 Scholarship Recipient Dustin Scott,  
with President Sandy Moore

## TRUMBULL CO. NEWS



Above: The 2019 winners are seated l. to r. McKenzie Davis, Elisabeth Krinos, Jenna Craigo and Jersee Hogue with scholarship committee members :Donna Pate, Sue Datish , Anita Shaw and Joyce Faiver (photo credit Roselyn Gadd)

**The Trumbull Retired Teachers Association** announced scholarship winners for 2019. The winners are **McKenzie Davis, Elisabeth Krinos, Jenna Craigo and Jersee Hogue**.

The scholarship winners are from the Trumbull County Schools of Niles, Hubbard, Howland and Maplewood. Congratulations to these lucky recipients! Scholarships are funded by member donations and fund-raisers.

Eight area teachers were also recognized as “**A Plus**” teachers: **Jodi Walker, Diana Smith, Terri Fleming, and Mary Davis, David Zelenak, Keith Rising, Brian Luther, and Jenna Barvitski**. This honor is sponsored by **Trumbull Retired Teachers Association, Warren Tribune and Outback Steakhouse**

To learn more about the Trumbull Co. chapter and scholarship program, please visit their [website](#).



Above: Seated l. to r. Jodi Walker, Diana Smith, Terri Fleming, and Mary Davis. Standing:L to r. David Zelenak, Keith Rising, Brian Luther, Jenna Barvitski

# SANDUSKY CO. 2019 SCHOLARSHIP AWARDS

The Sandusky Co. Retired Teachers Association has awarded its 2019 Scholarships to two lucky recipients: Trinity Morelock and Bryson Wargo. Congratulations to both of the winners!

To learn more about the Sandusky Co. scholarships and chapters, please visit their [website](#).



Above:  
Trinity Morelock and Bryson Wargo with Ellen Beier and Holly Wolpert

## WHAT'S ORTA UP TO?

Take a look at what's coming up in September around our chapters and organization! The calendar is always available on our website. Follow the link to view:  
<http://www.orta.org/>



### Wednesday, September 4

11:30am Athens Co. Retired Teachers Association Meeting

### Thursday, September 5

9:30am SE Regional Meeting, Part 2

### Monday, September 9

5:30pm Henry Co. Retired Teachers Association

### Wednesday, September 11

11:30am Cuyahoga/Greater Cleveland Chapter Meeting

11:30am Mahoning Co. Retired Teachers Association Meeting

11:30am Montgomery Co. Retired Teachers Association Meeting

12:00pm Butler Co. Retired Teachers Association Chapter Meeting

### Friday, September 13

11:00am Coshocton Co. Retired Teachers Association Meeting

11:30am Sandusky Co. Retired Teachers Association Meeting

12:00pm Stark Co. Retired Teachers Association Meeting

### Monday, September 16

12:00pm Lawrence Co. Retired Teachers Association Chapter Meeting

### Tuesday, September 17

11:30am Mercer Co. Retired Teachers Association Meeting

### Thursday, September 19

11:30am Ross Co. Retired Teachers Association Chapter Meeting

12:00pm Meigs Co. Retired Teachers Association Chapter Meeting

### Friday, September 20

12:00pm Alliance Area Retired Teachers Association Meeting

12:00pm Hardin Co. Retired Teachers Association Meeting

### Wednesday, September 25

9:30am NW Regional Meeting, Findlay OH

# MORE FROM MAHONING CO.

The Mahoning County Retired Teachers Association recently met for its annual “In-Memorial” program. All Mahoning County public school educators for the 2018-2019 membership year were eulogized. A book entitled “*Apollo to the Moon*”, by Teasel E. Muir-Harmony has been purchased on behalf of the “**John M. Knapick Memorial**” in honor of deceased MRTA members. It will remain in the permanent collection of the Public Library of Youngstown and Mahoning County. President **Susan Harris**, In-Memorial Chairperson **Sally K. Winsen**, and Remembrance Chairperson **Martha Lopez** honored these passed members.



Pictured above: The Struthers Choir

The chapter also met for its spring luncheon to recognize its “**75 and Older Members**” for their support and contribution to the association and to public education. Board Member **Peggy Bennett**, presented carnations to all the honorees. **Mary Allgood**, was acknowledged as one of the oldest “**over 100**” active MRTA members. The attendees were entertained by the talented **Struthers Choir** during this meeting.

To learn more about the Mahoning County Chapter, please visit their [website](#).



Pictured above: President Susan Harris, In-Memorial Chairperson Sally K. Winsen, and Remembrance Chairperson Martha Lopez



Pictured above: MRTA “Over 75” Honorees; Mary Allgood (front, center), 100, is the chapters oldest member

# LATEST IN LOGAN CO.



Pictured above: 2019 Lucy Brown Grant winners (l to r) Melissa Prentz, Renee Price, Denise Reed, and Theresa Nelson



Pictured above: Pictured above: 2017-18 Lucy Brown Grant winners (l to r) Renee Price, Alicia Pickering, Nicole Spencer and Beverly Rorrer



Pictured above: Scholarship recipients (center left to right) Anna Peterman nad Caitlyn Young

The Logan Co. Retired Teachers Association met on June 13th at the Masonic Center in Bellfontaine, Ohio. Over 30 people attended the meeting which was called "Award Night". **President Emerson Brown** introduced the 2019-2020 **Lucy Brown Grant** winners. The Lucy Brown Grant's are provided Emerson Brown in memory of his wife, a former teacher of Logan Co. Each teacher is given **\$250** to use for their classroom or school activity.

The Grants were awarded to **Renee Price, Theresa Nelson, Melissa Printy and Denise Reed**, who were joined in recognition with last years' winners. Some recipients of the Grant gave quick presentations on their projects and how the Grant helped achieve progress. Those presenting were **Alicia Pickering, Renee Price and Beverly Rorrer**. Grant winners **Jennifer Walls** and **Gretchen Powell** were unable to attend.

**Carol Davis** presented the two high school seniors who each received \$1000 for continuing their education. Both will be attending OSU. **Carol Davis** is Chairwoman of the scholarship committee assisted by **Nadine Tussing** and **Bill Davis**.

ORTA NW **Liaison B.J. Woodruff** brought the group up to date on current ORTA issues. President Emerson Brown asked for committee reports and led a discussion on the next meeting (occurred prior to this being published). A moment of silence was recognized for passed member **Jon "Chuck" Swartz**.

To learn more about this chapter, please visit their [Facebook page](#).

# ORTA STATUS REPORT (2019-2020)

This brief report is designed to provide the reader with information about the Ohio Retired Teachers Association (ORTA) as of August 2019. The report, hopefully, will provide adequate information to our members to know how ORTA operates. The information is provided in four main areas:

- **ORTA Membership**
- **ORTA Financial Status**
- **ORTA Success**
- **ORTA Challenges**

**ORTA's current leadership includes:**

**ORTA President – Gale Adkins**

**ORTA Past President – Bee Lehner**

**ORTA President Elect – Kara Mendenhall**

**ORTA Liaisons**

**Southwest – Ralph Moon, Becky Cropper/Evelyn Yockey, one unfilled position**

**Northwest – Carole Wolfe, B.J. Woodruff, Bruce Hodges**

**Central – Ken Moody, Karen Butt, one unfilled position**

**Northeast – Carol Kinsey, Susan Harris, Kendra Burger**

**Southeast – Don Ullmann, Brenda Davis, one unfilled position**

***\*Any ORTA member with an interest in serving our organization is encouraged to contact our offices at 614-431-7002 to learn about serving as an ORTA Liaison.***

## **ORTA Membership**

ORTA is a 501 C 4 (non-profit) state-wide organization composed of State Teachers Retirement System of Ohio (STRS) beneficiaries. This includes all STRS members, both active and retirees. ORTA membership is also open to family members of STRS members and 'others interested in education and the issues of retirees'. ORTA's primary mission is to monitor, advocate for and protect the pensions of STRS retirees.

ORTA is organized into 5 regions around the state of Ohio (Northwest, Southwest, Central, Northeast, and Southeast). In each of the 88 counties in Ohio a local retired teachers association (RTA) is established. Two counties in Ohio (Stark and Cuyahoga) host two separate retired teacher organizations. In all, ORTA is comprised of 90 Local RTAs. A handful of these Local RTAs are not active at the present time.

Each Local RTA functions independently from ORTA and engages in its own local activities. Cost for ORTA membership is \$30/year. The Local RTA establishes its own, independent dues structure, with most Local RTA dues established at \$10/year. Lifetime memberships at both the ORTA and the Local RTA are available. Lifetime membership in ORTA costs each member \$500. Currently, ORTA has 22,000 members. This number is down from ORTA's historical high point. As ORTA members pass on, fewer people have joined to replace those members that have passed.

## **ORTA Financial Overview**

ORTA's yearly budget for fiscal year 2019 is \$367,466. A historical look back at ORTA's budget provides a picture indicating an effort to reduce its expenditures. Important to note is that ORTA has not exceeded its budget in any of the last few years. For example, ORTA's budget for 2018 was \$372, 580, however, the expenses for 2018 were approximately \$288, 650. We project the 2019 actual expenditures will be less than the budget as well. The point to make here is that ORTA is attempting to reduce its cost while providing the same advocacy and support as it has in the past. For comparison, the ORTA budget for 2005 was \$495,000.

A question to ask at this point is how is ORTA able to reduce its costs in such a significant manner? Several actions taken since 2017 provide the answers:

- ORTA has reduced its costs associated with salaries and benefits. ORTA is staffed by 2 full-time employees (Publications and Communications Coordinator Alissa Burton, and Administrative Assistant and Membership Coordinator Mia McLean) along with 2 part time employees (Executive Director Robin Rayfield and Finance Officer Evelyn Massey). The cost for employees is greatly reduced from years ago.
- ORTA has reduced its costs associated with its publications budget. As many ORTA members have noticed, the ORTA quarterly is no longer mailed to each member. Although the decision to eliminate this service was difficult, the costs associated with printing and mailing the Quarterly was in the \$80,000 range. Additionally, ORTA's Publications and Communications Coordinator (Alissa Burton) is trained in this area. Previously, ORTA paid to have a company develop its communications that were mailed. The cost of this service was tremendous (\$35,000 or more). Now, ORTA can do these tasks without the charges to an outside company.
- ORTA has reorganized from its days of having District Directors and Trustees to our current model of Regional Liaisons. This move reduced the numbers of people attending meetings in Columbus, significantly. Along with this reduction in numbers of people travelling to Columbus the costs associated with these meeting is reduced.
- ORTA has partnered with Education First Credit Union in Franklin Co. This partnership provides for payment of membership dues for people that open new accounts with EFCU. Also planned is a new low interest rate credit card exclusive for ORTA members that carry the same dues payment for people.
- Finally, ORTA has moved its office resulting in significant savings to the organization. Our new address (August 12, 2019) is: **250 East Wilson Bridge RD., Suite 150, Worthington, Ohio 43085**

On the revenue side of things... ORTA collected just over \$153,000 in membership dues in 2018. Currently, we are on pace to repeat this figure in 2019. ORTA's partnership with AMBA (Association Member Benefits Advisors) provides an additional \$40,000 in revenue and our co-tenant (Michael Collins Group) provides \$7200 in rent fees. So, the income to ORTA is approximately \$200,000 per year. With expenses (\$288,000 in 2018) exceeding revenues (\$200,000 in 2018) ORTA's financial picture is not positive. However, ORTA does have investments that allow operations to continue. Each year our investment income has provided the difference between the expenditures and our revenues.

### **ORTA Success**

ORTA has been successful in several ways this year. Listed below are some of the 'achievements' over the last couple of years:

- ORTA worked with its Local RTAs to host Regional Meetings in each of the five regions. Local leaders from all local chapters were invited to meet with their Liaisons (think of District Directors) and ORTA staff to work on problems and celebrate successes. Regional meetings are also being scheduled or have already been scheduled for 2019.
- ORTA worked with STRS through its our seat on the HPA (Healthcare Pension Advocates for STRS) council to 'hold the line' on healthcare insurance costs for STRS retirees, both Medicare and non-Medicare recipients.
- ORTA worked with STRS to continue the \$29.90 per month subsidy currently provided by STRS to Medicare recipients.
- ORTA was present and provided comments at every STRS Board of Trustee meetings voicing concerns at issues surrounding the loss of COLA for retirees. As a result of ORTA's (and other vocal members) efforts the STRS revised its funding policy to consider benefit enhancements for retirees at an 85% funding level as opposed to the 100% funding level that was in place. This is a significant change in direction on the part of the STRS Board of Trustees.
- ORTA was vocal at STRS meetings regarding the unfair wage increases and performance payments for STRS employees in the face of suspension of COLA for retirees. This position taken by ORTA that STRS employees should share in the sacrifice of the retirees of the STRS system was popular with retirees.
- ORTA was vocal at STRS meetings regarding the unfair wage increases and performance payments for STRS employees in the face of suspension of COLA for retirees. This position taken by ORTA that STRS employees should share in the sacrifice of the retirees of the STRS system was popular with retirees.

- ORTA was successful in scheduling meetings with state legislators to inform them about the impact the loss of COLA has had on retirees. Legislators have been positive and receptive to the message that ORTA members do not want anything more than what we were promised.
- ORTA has attended all meetings of the ORSC (the legislative body that oversees all public pensions). Our attendance has been recognized by several members of this important body.
- ORTA has published a monthly newsletter emailed to all ORTA members with an email address on file and posted to the ORTA website. Additionally, ORTA published a 'ORTA Year in Review' in January as an effort to communicate with members that do not have the capability to receive email.
- ORTA revised and updated its website and has assisted many local chapters in development of a local RTA website.
- ORTA successfully partnered with Education First Credit Union in Franklin Co. providing potential benefits to ORTA members and membership growth opportunities.
- ORTA leadership has visited approximately 60 of the 80 active local chapters.
- ORTA moved its office in a cost savings measure to 250 East Wilson Bridge Road, Suite 150 Worthington, Ohio 43085.
- ORTA also has worked with the STS Members Only Facebook Group to share information and provide support for the fight to restore COLA for STRS retirees.

### **ORTA Challenges**

Like any non-profit organization today, ORTA faces a variety of challenges. People, including retirees, are busy nowadays. Listed below are some of the most significant challenges ORTA faces:

- Membership has shrunk over the last decade. ORTA needs to find a message or purpose to rally retirees to join ORTA. With a politically polarized society finding that message is difficult. People in general do not 'trust' other people. Elected officials in Ohio are overwhelmingly conservative. Our state legislators are against anything that might be considered a tax increase. This includes increasing support for retirees through STRS. As such, it is difficult to get traction for ideas to increase support for public educators. The recent budget submitted by DeWine is positive in that it increases spending on education in Ohio, but I'm not convinced that this budget will result in significant increases to Ohio's retired teachers. ORTA, through its Executive Director, has developed a relationship with a large group of vocal people concerning the loss of COLA through the STRS Members Only Forum on Facebook. Much of what is posted on their Facebook page makes sense for STRS retirees. Although some of the rhetoric is confrontational and caustic, this group of people is making a strong case for the return of COLA. ORTA supports this position and has gained membership through this relationship. But the sad fact is that ORTA is an aged group. So many of our longtime members pass each year that it is difficult to replace them at the rate of their passing. With just over 22,000 members and a potential membership of nearly 150, 000 it seems as though ORTA could and should grow its membership. Our challenge is to find people that care and are willing to help in the fight to protect and improve our retirement!
- Leadership within ORTA is also diminishing. At every local chapter meeting the same refrain emerges. ORTA Needs leaders at the local level. People seem willing to maintain their membership with ORTA and their local chapter, however, few people are willing to step forward and provide leadership. Once seated as a local chapter president or officer, people are 'stuck' in that role for years and years. ORTA is working with local chapters to look at this problem from a few different perspectives. Alternatives to traditional leadership models of President, Vice-President, Secretary, and Treasurer are currently being replaced by leadership by committee. ORTA local chapters are also attempting to attract new retirees to their organizations. These new members bring new ideas about leadership and the direction of many local chapters.
- Financial challenges at ORTA are real. With decreasing membership comes decreasing revenues. Fortunately, ORTA is currently working to reduce expenditures. With income from investments our financial future is stable, however, membership growth is of great importance from a financial perspective.

The good news for ORTA is that our challenges as retirees are similar to the challenges that we have faced as educators. We are all too familiar with the 'do more with less' mentality that we faced as teachers and administrators. We may be older, but the fight we have left within our ranks is significant. As Executive Director at ORTA, I have pledged to do whatever I can to fulfill our mission of making retirement for teachers in Ohio a time of less worry and a time to enjoy our waning years. I hope that all ORTA members will join me in this daunting task.

As always, thanks for your continued support of ORTA.  
—Dr. Robin Rayfield



Above: Linda Kruaskopf, Barbara Hoffman of Pillars of Success



Above: (left to right) Charlotte Shrider, Henry Co. President, Carole Wolfe and Nan Bretz Membership Chairman

## HENRY CO. HOSTS SPECIAL GUESTS

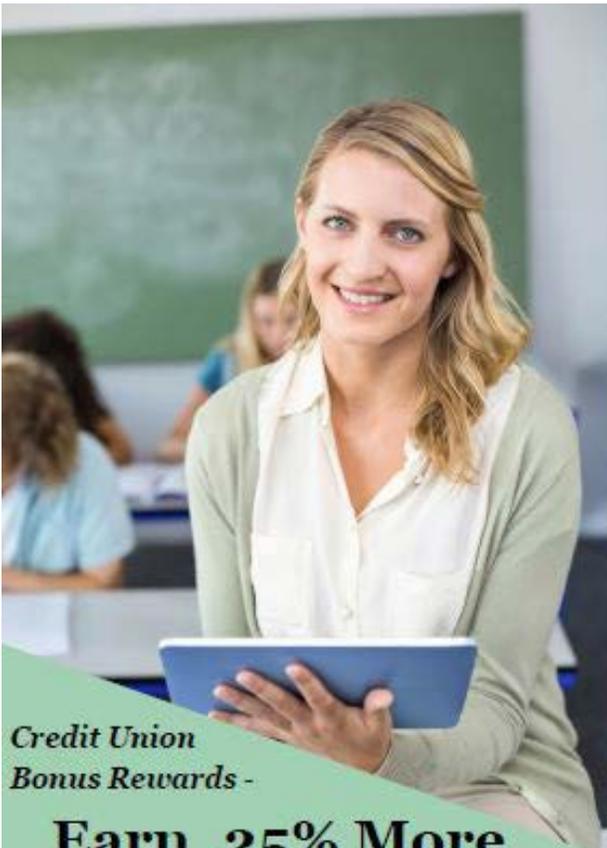
The Henry Co. Retired Teachers Association hosted their spring meeting on May 13th, in Napoleon, Ohio.

After a delicious meal, the group was proud to welcome speakers **Linda Krauskopf** and **Barbara Hoffman** representing **Pillars of Success**. Pillars of Success is a organization who's mission is to strengthen Henry Co. by providing short term housing and refer supportive services to homeless people in an atmosphere of dignity and respect with the goal of helping them to regain a quality of life.

The ladies stated that a sample of housing and homelessness in Henry Co. for one day was identified as 77 homeless individuals, 13 families, 11 men, 12 women, 18 youth and 1 veteran. They also stated that 256 are at risk for homelessness.

ORTA NW Liaison **Carole Wolfe** also attended and gave an update on COLA status, ORTA's approach to **POP5**, which many members have received literature from. ORTA is NOT affiliated with POP5, and they are not present at STRS meetings to represent retirees.

To learn more about the Henry Co. chapter, please visit their [website](#).



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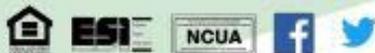
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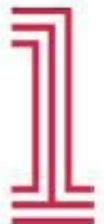


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# A DAY WITH DEFIANCE CO.

The Defiance Co. Retired Teachers Association held their recent meeting at St. John's United Church of Christ in Defiance with close to forty members in attendance. The ladies of the church provided a delicious meal, and opened with prayer from **Don Hang**.

Scholarship recipient **Kayla Rethmel** from Tinora High School was awarded \$300, and will graduate from Defiance College.

The guest speakers for the meeting were **Lisa Weaner** and **Staci Fedderke** from the **Fort Defiance Humane Society**. They explained what the organization does for the area, how their main source of income is primarily donations, adoptions and more. Last year, the shelter took in 739 animals, and as of 2019 over 200 animals have been brought in. They mentioned that they also work closely with the **Vet Tech Program at Four County Career Center**, where students learn about the animal care industry first hand.

NW Liaison **Carole Wolfe** closed the meeting with ORTA and state updates such as COLA and STRS news.

To learn more about the Defiance chapter, please visit their [website](#).



Above: Kayla Rathmel, scholarship winner and DCRTA President, Ilse Goertz

## IN MEMORIAM:

### **Auglaize Co.-**

Arilla Baurer (chapter's oldest member, 106)  
July 28, 2019

### **Stark Co.-**

Mary E. Glaros, Stark Co. and ORTA Life Member  
July 3, 2019  
Jane Wentz, Stark Co. and ORTA Life Member  
July 16, 2019  
Donna Louise Brandon, Stark Co. and  
ORTA Life Member  
August 8, 2019

### **Trumbull Co.-**

Cynthia Sweeney, ORTA and TRTA Life Member  
July 5, 2019  
Willow Jean Rowley, ORTA and TRTA Life Member  
August 1, 2019

***\*Deceased Member submission Policy update:  
If you submit member(s) passing, please forward any  
obituary or funeral arrangements for our records.***

***"When our time on Earth has been complete,  
Our spirit moves on, more mysteries to seek.  
Celebrate what this person meant to you,  
Cherish the memories when this life  
you review."***

***—B.J. Woodruff***



*With Sympathy...*