

# OSURA

## News



THE OHIO STATE UNIVERSITY

January 2024

P.O. Box 14533, Columbus, OH 43214  
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## Kwanzaa

By Nancy Wardwell

**Kwanzaa 2023 was celebrated December 26 through January 1, 2024.** Unlike many of the winter holidays, it is not a religious holiday, but is a celebration of African and African American culture. It was first celebrated in 1966, created by activist Maulana Karenga, presently Chair of Africana Studies at California State University-Long Beach. The name “Kwanzaa” is derived from a Swahili phrase meaning “first fruits” and celebrates Africa as the birthplace of human culture. At the center are candles on a “Kinara” and on the succession of seven nights a candle is lit, and the principle it represents is discussed by the family.

The first (and center) candle represents Unity. The next candle represents the principle Self Determination. On the third day the candle represents Collective Work and Responsibility. The next candle represents Cooperative Economics and then Creativity. On the seventh and final night the candle represents Faith.



### The Core Symbols of Kwanzaa

**The Crops (Mazao)**

Productive and collective labor

**The Mat (Mkeka)**

Tradition and history

**The Candle Holder (Kinara)**

**The Corn (Mihindi)**

The children

**The Unity Cup**

Foundation and unity

**The Seven Candles**

3 red, 1 black, 3 green – each principle

**The Gifts**

Labor and love of parents

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**Communications**

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Sally E. Dellinger

**Event Planning**

Cultural Arts & Travel –

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Social – Elenore R. Zeller

**Friendship**

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**Benefits Committee**

Evelyn B. Freeman

**Ohio Council of Higher**

**Education Retirees**

Nancy Wardwell and

Gerald H. Newsom

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**Retirement System**

Darian M. Torrance

**Special Interest Groups**

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**State Teachers Retirement System**

Gerald H. Newsom

**Historian**

Raimund E. Goerler

**Emeritus Academy**

Mary Jo Fresch

**Newsletter Editor**

Nancy S. Wardwell

**OSU Foundation**

OSURA Endowment Fund

Number – 605419

OSURA Fund to Combat Student

Food Insecurity – 316596

[osura.osu.edu](http://osura.osu.edu)

## FROM: The President



Sally Dellinger

January and 2024 is here. Are you ready? Usually with the New Year one thinks of making resolutions, making changes to one's life.

Resolutions never quite worked for me. I probably was like a lot of others who began with the very best thoughts of making changes,

improving. Well, that didn't last long. Now January has taken on a new look for me. I have come to see the New Year as a beginning. So, I am going to start with seeing, listening, touching more clearly, more completely,....more. Starting with seeing, I'm going to notice the sun, the sky and clouds, the moon and stars, the lights that are still adorning homes, the people around me. With listening.... stand still and what do you hear? I know I'll hear the birds, Sadie's barking at Rocky and the squirrels, the train traveling down the tracks in our area, and children playing in the schoolyard nearby. Feeling/touching is often overlooked. So, adding to my list I'm going to begin to feel the earth when planting flowers, a fresh washed towel, the sun on my face, water running through my fingers, and Sadie's fur (she wanted to be sure she got mentioned again).

I could go on but I want you to think about what you might begin this January. I hope it involves your family and friends....and, of course, your fellow OSURA members. Let's BEGIN....now!

**Sally Dellinger**

President of OSURA



## FOR YOUR INFORMATION:

In 2022 the U.S. Congress passed the SECURE 2.0 Act. This act updates the rules for all of the IRA, 403b, 457b, 429, and similar Federal SRA plans. You should review this Kiplinger article referenced below which also appears in the OSURA web site as the October 19 News item. This Kiplinger article provides an overview of the updates that the U.S. Congress has made to the rules for these Federal SRA plans.

This will put OSURA members in a position to ask better questions at the OSURA Tax Seminar to be held on January 26. The tax experts there should be able to provide a more detailed discussion of these updates to these Federal SRA plans. Please stay tuned to the OSURA Newsletter and to the OSURA website for more details concerning the OSURA Tax Seminar.

Meanwhile, the URL for this Kiplinger article on the SECURE 2.0 Act can be found at URL: <https://www.kiplinger.com/retirement/bipartisan-retirement-savings-package-in-massive-budget-bill>

## Welcome New Retirees

**Mary Jane Abell**  
Human Resources

**Ciriyam Jayaprakash**  
Physics Administration

**Jeffrey W. Krigbaum**  
UniPrint Printing and  
Copying Production

**Jonda E. Thomas**  
Medicine-Surgery Cardiac

**Robert R. Bostic**  
Administration and Planning

**Cynthia Vee Jenkins**  
The James

**David Allen Perry**  
University Hospital

**Lijuan Wang**  
Physics Administration

**Cynthia Kay Boyd**  
Ross Heart Hospital

**Wanda D. Kirk**  
ERIK - ULAR Administration  
and Fiscal

**Ramona Irene Powell**  
FAES - Plant Pathology

**Patricia E. Whilding**  
Newark Campus

**Paul T. Green**  
ERIK - Byrd Polar and Climate  
Research Center

**Susan R. Korte**  
Health System Shared  
Services

**Kimberley A. Preece**  
Ambulatory Services

**Elizabeth Ann Windisch**  
Medicine-Physical Medicine  
and Rehabilitation

## OSURA Connects with Students Through Service

OSURA members are invited to engage with current students on Monday morning, January 15. This day honors the MLK legacy by serving the Central Ohio community. OSURA members will work side by side with students at local nonprofits on a variety of social issues, such as: homeless/houseless citizen support, mental health advocacy, healthy food access, child welfare, and support for frontline workers.

### You can:

1. Join for the opening ceremony festivities (usually in Ohio Union) cheering on the participants and/or
2. Volunteer and connect with students during on-site activities in all areas mentioned above. All activities take place during the Jan 15 morning of service, with volunteer shifts lasting 2-3 hours.

These opportunities take place both on and off campus, with transportation provided to any off-campus sites. If you are assigned to an off-campus site, buses will be provided. Your ability level may determine your assignment.

### If you are interested in joining us for:

1. Opening ceremony or
2. Volunteering, please send an email to Thomas.8@osu.edu with Day of Service in the Subject. Send your name, contact email, and phone number or call 740-791-9013 with a voice mail message stating "Day of Service" along with your name and phone number. More information will be provided closer to the event.

The day is sponsored by *Pay It Forward*, a student cohort within the Office of Student Life which is dedicated to service.

## A Wonderful Tribute to Longtime OSURA Member Fern Hunt

Fern is a former President, long-time Chair of our Friendship Committee. She has contributed in so many ways, including as one of the initiators of our annual Fall Conference – then called "Coping with Change"!

Visit <https://www.osu.edu/giving/features/fern-hunt.html> to read more.

## OSURA Coffee Hour on January 18, 2024, at 9 a.m.

A Coffee Hour will be held both in-person at the Longaberger Alumni House and via Zoom to meet with new OSU Retirees to introduce them to OSURA and show them all we have to offer. Whether you are a new OSURA member or a seasoned member, you are welcome to join us to learn more about OSURA or provide some insight to others.

If you would like to participate in the Coffee Hour, contact Sandy Bell via email at sib9716@outlook.com or via cell/text at 740-833-6374 to let her know you are coming or to receive the Zoom Link information.

# Calendar of Events

## COMMITTEE MEETINGS

### January 2 (Tuesday) Benefits Committee

Time/Place: 9:15 a.m.,  
Longaberger Alumni House

### January 9 (Tuesday) Board Meeting

Time/Place: 9:30 a.m.,  
Longaberger Alumni House

### January 24 (Wednesday) Membership Committee

Time/Place: 9:30 a.m.,  
Longaberger Alumni House

## MONTHLY ACTIVITIES

### January 9 (Tuesday) Photo Society

Time/Place: 11:30 a.m. lunch; 1 p.m.  
program; OSU Faculty Club.

**\*\*Note new time\*\***

Cost: on your own

Arranger: Nancy Verber (nwverber@  
gmail.com – Photographic Society SIG)

### January 13 (Saturday) Walking/Hiking Group – Alum Creek Park

Challenge Level 2-4

Join the us for a pet-friendly 2.2 or 3.6  
mile easy hike. We will meet at the parking  
area on Africa Road directly across from  
Plumb Road. There will be time for some  
extra socializing and refueling afterwards  
at a nearby restaurant. Questions? Contact  
Sandy Bell...info below

Time/Place: 1 p.m., 3305 S. Old State Rd,  
Delaware

Arranger: Sandy Bell (sib9716@outlook.  
com /cell 740-833-6374 – Walking/Hiking  
SIG)

### January 17 (Wednesday) Lunch Bunch – Decluttering to Downsize

Come see what Ellen Limes and Julie Otto-  
Ribe from Transitioning Through Life has  
to offer you.

Time/Place: 11:15 a.m., MCL Cafeteria,  
Kingsdale

Cost: On your own, order through cafeteria  
line starting at 11:15 a.m., activities begin  
at noon.

Arranger: Elenore Zeller and Steven  
D'Ambrosio (Steven.dambros@gmail.com  
– Social Committee)

### January 25 (Thursday) Dinner Series

Marta Jarzna, professor Department of  
Evolution, Ecology & Organismal Biology  
will speak on migratory birds and avian  
cross country biodiversity changes.

Time/Place: 5:15 p.m. reception, 6 p.m.  
dinner, 7 p.m. lecture; OSU Faculty Club

Cost: \$43 (service charge included)

Registration Deadline: Register at osura.  
osu.edu or call 614-292-2281 by Jan. 22.

Arranger: Carol Newcomb (clhotak@  
gmail.com – Dinner Series SIG)

## Book Club

Our play features *The Reading List* by Sara  
Nisha Adams. A chance encounter with a  
list of library books helps forge an unlikely  
friendship between two very different  
people (an older man—a widower) and an  
anxious teenager who works at the library.  
The connection forged from shared reading  
of books changes both of their lives.

Contact: Lee Hill (rmhlmh@att.net–  
Book Club SIG)

## SPECIAL EVENTS

### January 18 (Thursday) Coffee Hour for New Retirees

NEW

Time/Place: 9-10 a.m. Longaberger  
Alumni House & via Zoom  
Meet with new OSU Retirees to introduce  
them to OSURA and show them all we  
have to offer. Whether you are a new  
OSURA member or a seasoned member,  
you are welcome to join us to learn more  
about OSURA or provide some insight  
to others. If you would like to participate,  
contact Sandy Bell via email at sib9716@  
outlook.com or via cell/text at 740-833-  
6374 to let her know you are coming or to  
receive the Zoom Link information.

Arranger: Sandy Bell (sib9716@outlook.  
com- Membership Committee)

## Registration Instructions

- 1. Registrations requiring payment:**  
Registrations can be made by going  
on-line to [osura.osu.edu](https://osura.osu.edu) or by calling  
**614-292-2281** or **1-800-762-5646**.  
Your registration is not complete  
until payment is made, so have your  
credit card ready. Checks are no  
longer being accepted.
- 2. Registrations NOT requiring payment:**  
Registrations will be made through  
the Arranger's email provided in the  
description of the event.

## CHALLENGE LEVELS

- 1 Light** – may include a few stairs.
- 2 Moderate** – may include a few sets  
of stairs.
- 3 Moderate +** – may include climbing  
many stairs and/or uneven terrain.
- 4 High** – may include lots of walking,  
climbing stairs, hilly walkways and/  
or extended weather exposure.

### January 26 (Friday) 2023 Income Tax Seminar - VIRTUAL

Representatives of Truepoint Wealth  
Counsel of Cincinnati will discuss  
Federal and State income tax issues  
for 2023. OSURA Registration link  
[https://osu.zoom.us/webinar/register/  
WN\\_Ez0X5mCwQ02ahfHhg5iGyA](https://osu.zoom.us/webinar/register/WN_Ez0X5mCwQ02ahfHhg5iGyA)

Time: 1 – 2 p.m.

Arranger: Hallan Noltmier (noltmier.2@  
osu.edu – Benefits Committee)

### February 7 (Wednesday) Emeritus Faculty Lecture Series

Ronald Solomon, Mathematics,  
will present "*Sporadic Simple  
Groups and the Ohio State  
Math Department.*"

NEW

Time: 4 – 5 p.m.

Cost: Free and open to the public  
Registration: Register at [https://oaa.osu.  
edu/emeritus-academy-lecture-series-  
registration](https://oaa.osu.edu/emeritus-academy-lecture-series-registration)

Contact: Mary Jo Fresch (fresch.1@osu.edu)



Here is a link to our events: <https://osura.alumni.osu.edu/events/>

## February 9 (Friday) BalletMet – Alice

Challenge Level 2



### REGISTRATION REQUIRED

Trip and fall into the wonderful world of Edward Liang's *Alice*. Familiar characters from Lewis Carroll's stories wait for you just down the rabbit hole in a fantastical adventure. Don't miss "live" flamingos, dancing cards and, of course, a tea party.

**Time/Place:** Box office opens at 9:30 a.m. Seating is general, so plan to arrive early for best seats. Performance begins at 11 a.m., Ohio Theatre, 39 E. State St.  
**Cost:** \$33.40 (admission ticket)  
**Registration/Refund Deadline:** Register at [osura.alumni.osu.edu](http://osura.alumni.osu.edu) or call 614-292-2281 by January 30. Credit card preferred. Tickets will be held at Will Call.  
**Arranger:** Brenda Hosey (Bhosey1@columbus.rr.com – Cultural Arts Committee)

## March 20-23 (Wed. – Sat.) Washington, D.C. Cherry Blossoms

Challenge Level 3

### REGISTRATION REQUIRED

Discover the beauty of our nation's capital in early spring when the cherry trees are in full bloom. Stay overnight in Old Town Alexandria and explore the iconic sites in and around Washington D.C. Take a trip to Mount Vernon.

**Meet by:** 6:30 a.m. Wednesday, March 20, Prime Tours 565 Metro Place South, Dublin, OH  
**Return:** approx 8 p.m. Saturday, March 23  
**Cost:** \$1398 double, \$1870 single, (\$1238 Triple/quad); includes motor coach transportation, 3-night lodging, 3 breakfasts, 1 dinner, Cherry Blossom

walking tour, all the major memorials, Washington's Mount Vernon, all museums, Arlington National Cemetery, United States Capitol Tour or if possible The White House, Ford's Theater and Peterson House  
**Registration:** Register online [www.goprimetours.com](http://www.goprimetours.com), select OSU Cherry Blossom DC Tour; enter password - Buckeyes—save your spot with \$100 deposit.

**Payment Deadline/Refund:** Jan. 5, 2024  
**Arranger:** Constance A. Oulanoff (Travel/Cultural Arts Committee)

## April 13 (Saturday) Franklin Park Conservatory & Columbus Cherry Blossom Festival

Challenge Level 3

### REGISTRATION REQUIRED

Celebrate Nature Clothe in Kaleidoscope Spring Splendor inside & outside FPC. Experience colorful Chihuly Glass Art Exhibit and demo. Cherry trees are in full bloom! Spectacular Greater Columbus Cherry Blossom Festival—enjoy the music, exhibits, and more.

**Meet by:** 8:30 a.m., at Franklin Park Conservatory front entrance

**Return:** 6 p.m.

**Cost:** \$40 Non-Members of FPC, \$24 FPC Members; cost includes admission fee, lunch, and docent fee.

**Registration:** Register at [osura.osu.edu](http://osura.osu.edu) or call 614-292-2281 by March 22.... and choose your lunch. (1-Signature Club Sandwich, 2-Smoked Turkey Sandwich, 3-Greek Hummus Wrap (Vegetarian), or 4-Seasonal Salad with Grilled Chicken)

**Refund Deadline:** March 22

**Arrangers:** Nancy Hughey, Darian Torrance, Marlinda Iyer (Marlindaiyer@yahoo.com – Travel/Cultural Arts Committee)



On December 8 close to 40 OSURAns climbed on a bus to Springboro and The La Comedia Dinner Theater for lunch and a wonderful performance of *Miracle on 34th Street: The Musical*

## In Memoriam

**Joseph J. Borghese**  
November 14 | 93

**Donald Allen Chandler**  
November 6 | OSU Research Farm - Ripley, 87

**Mary Deerwester**  
October 16 | Academic Advisor, 73

**Ronald Frederick Guenther**  
November 10 | OSU Extension - Shepherd, 81

**Mary Lu Harrison**  
November 28 | OSUMC and OSURA, 81

**Linda Gordon Howard**  
September 15 | College of Law, 74

**Eileen M. Krak**  
November 10 | OSUMC and OSURA, 87

**Michael Anthony Lee**  
November 21 | 60

**Mary Elizabeth McClamb**  
November 9 | Office Associate, 99

**David Munn**  
November 19 | Ohio State ATI, 76

**Barbara "Jeanie" Ray**  
October 29 | 77

**Keiko Komiya Samimy**  
November 26 | Teaching and Learning, 71

**Steven Schwartz**  
November 25 | Haas Endowed Chair - Department of Food Science and Technology, 69

**Judith Schwartzbaum**  
November 2 | College of Public Health, 78

**Stephen Simmons**  
November 7 | Athletics, 77

**Susie Storer**  
November 21 | OSU East, 70

**Carrie Elizabeth Wherley**  
November 16 | OSU Cooperative Extension, 82

# Wisdom Wednesdays will make 2024 the Year You Become Wiser



OWLS (Older, Wiser Lifelong Scholars) will present five online courses (via Zoom) exploring five diverse topics that will make you wiser! For only \$15.00 a course, you can sit in your own home and enjoy five outstanding experts as they discuss painter Roy Lichtenstein, the history of marches, food insecurity in central Ohio, untold stories about the history of Columbus, and nitty-gritty details about the 2024 election during “Wisdom Wednesdays” 2024! These unique and informative presentations will air on the third Wednesday of each month, from 1-2:30 pm (the March program will be on the second Wednesday) beginning January 17. Sign up by Jan. 10 to receive a price break on the entire package, but don’t miss them!

For more information and to register, go to: [www.owls.coursestorm.com](http://www.owls.coursestorm.com) and select Early Bird Series for full course discount.

## FROM BENEFITS COMMITTEE | ELDER CARE 2024

### Housing

By Meg Teaford

The Joint Center for Housing Studies at Harvard has released a report on housing for older adults in the United States. Much of what they report is a continuation of earlier information from the Census and other sources. But it does highlight the dire situation we are facing with a shortage of adequate and affordable housing for our oldest population (those 85+). The demand for such housing as they report “dramatically outstrips supply” with long waiting lists.

Among their findings

- Almost 11.2 million older adults are spending more than 30% of their income on housing, a significant increase from 2016
- Those with incomes under \$25,000 per year were more likely to have mortgages or rent as opposed to owning outright.
- Renters are more likely to report the burden of housing costs with half of those in large metro areas spending half of their income on housing
- The rate of homelessness is increasing among those age 65 and older; 7.4% of the homeless living in shelters are at least 65 years old and those 55-64 years old are another 21.3% of the population
- With 55% of those age 80 and older reporting at least one disability, there is a shortage of supportive housing such as accessible housing with single floor living. As of 2019, only 47% of those age 65-79 lived in a home with basic single floor living and a no-step entry. About half of those 80 and over had such living arrangements.
- More older adults need assistance with the activities of daily living such as bathing, dressing, and mobility
- The cost of home health care is increasing and only 13% of those 75+ and living alone could afford assisted living without dipping into their financial assets; only 14% could afford a daily visit from a home health aide. This is a special problem for renters who often do not have the financial resources of homeowners.
- The report also highlighted the inequalities by race and ethnicity in home equity and non-housing wealth that limit the ability to make repairs and/or modifications to one’s home to support aging-in-place.

This was a meaty report with lots of specific information and suggestions for more support and programing. Much more is needed.

## FROM: The Benefits Committee

### OPERS Report

By Darian Torrance

The OPERS Board met on November 14-15, 2023 to discuss and approve the following:

- The Board approved a motion to allocate all employer contributions toward pensions, with none going to the health care fund. Future allocations to the health care fund are dependent upon “investment returns and pension funding levels.”
- The board approved items presented by staff during the Audit Committee meeting including the following:
  - The ORSC Annual Audit Committee Report for 2023;
  - Acceptance of the 2024 risk assessment process and the six-month audit plan as proposed by staff; and
  - Changes to the internal audit committee charter.
- CEM Benchmarking, an industry consultant, presented a review of OPERS benefits and investments.
  - OPERS is considered a low-cost, high service pension system. This is due in large part from investments in information technology, resulting in lower overall administrative costs.
  - OPERS’ “total pension administration cost of \$52 per active, inactive and annuitant was \$29 below the peer average of \$81.”
- OPERS’ “total service score was 87. This was above the peer median of 81.”
- Investment results over the past five years show that OPERS return (5.1%) is lower than the median US public pension funds (5.9%). OPERS is considered a low-cost investor compared to its peers.
- “OPERS’ investment costs were \$390.6 million or 35.5 basis points (bps) in 2022,” which is down from 48.1 bps in 2018.
- NEPC, LLC presented the third-quarter investment update for the Defined Benefit (DB) Fund and Health Care (HC) Fund. The DB fund was down 1.9% during the third quarter 2023. As of September 30, the fund balance was \$93.3 billion. The HC fund lost 2.9% in the third quarter, and the fund balance was \$11.9 billion (up 4.6% YTD). OPERS is on a calendar year basis for reporting.
- OPERS Investment staff presented NEPC’s annual review of the Defined Contribution (DC) fund, which grew from \$2.1 billion to \$2.3 billion at the end of the third quarter 2023.
- OPERS staff presented an overview of a new health care education initiative that will provide members with more specific information regarding health care plan choices, moving from pre-Medicare coverage to Medicare, and how/when to use the OPERS Health Reimbursement Arrangement (HRA).

### STRS Report

By Jerry Newsom

We were all surprised when the STRS Board suspended Executive Director Bill Neville at the November Board meeting, a result of an anonymous letter claimed to be from STRS staff. Note that no evidence has been made public that supports the accusations that Neville badly mistreated staff members. My expectation is that, once the investigation is complete, the claims will be found groundless, and I hope the report is thorough and prompt. Last February, 5 of the 11 members of the Board had expressed a lack of confidence in Neville, and this group may easily become the majority next September after this Spring’s election, so Neville’s challenges will continue even if the investigation clears him of all charges. The acting Executive Director is Lynn Hoover, an experienced hand with good people skills.

Retirees are anxious to learn when regular Cost Of Living Adjustments (COLAs) will resume, which by law can’t happen until an external actuary agrees that can happen without undue risk of STRS’ financial future. The key metric seems to be how long it will take for assets to equal liabilities, given some plausible assumptions. The elephant in the room is the future return on investments. If these returns are strong, normal COLAs could resume in a few years; poor returns could mean it will take well over a decade.

#### STRS Fact

Ohio is one of 16 states to **fully tax** public pensions. An additional 16 **partially tax** them (a certain amount is tax free), 16 have **no pension taxes** and for 2 it’s more complicated.



**The Ohio State University Retirees Assn.**  
P.O. Box 14533  
Columbus, OH 43214

# Calling All OSURA Members



The Nominating Committee needs your help in identifying those who are ready to step up and join the OSURA Board. If you are interested in serving a 2-year term in one of the following positions or know of someone who would be a great fit for the job, please contact committee chair, Sandy Bell, via email at [sib9716@outlook.com](mailto:sib9716@outlook.com) or via phone/text at 740-833-6374.

#### **Vice President/President Elect:**

- Assist the President in various tasks
- Chair the Nominating Committee
- Assumes the role of President for the 2nd year of the term

#### **Member at Large (need 3):**

- Serve on the board to represent the interests of the members of OSURA
- Serve as a member of at least one OSURA committee

Help us to continue the great work of OSURA for another 40 years!