

2023 SRS Retiree Association (SRSRA) Annual Meeting Minutes

April 25, 2023, USCA Etherredge Center; Aiken, SC

Call to Order and Opening Remarks – Gene Dixon, SRSRA

The meeting was called to order at 1:00 pm. The following contributors were recognized for their support: our SRSRA members, the SRS Employee Association, Savannah River Nuclear Solutions, Savannah River Mission Completion, and the Battelle Savannah River Alliance. The Lessie Senior & Youth Center and staff, and WJBF were also recognized for their support for our meetings.

The mission of the SRSRA is to advocate for retiree pension and medical benefits, provide support of SRS retirees, ensure retiree benefits and needs are visible to the broader community, and support current and future missions of the SRS.

The SRSRA Board of Directors (BOD) has given voice to retiree concerns and issues with those who can affect change. We meet regularly with DOE and all SRS prime contractors. We request their consideration and influence in providing SRS pension and health benefits that support a healthy and dignified retirement. To give this voice a positive impact, we must show strength, viability, and visibility. We must have a growing membership and willing volunteers. The BOD wants every retiree to join the SRSRA to increase our strength through numbers. Reach out to a retiree who may not know about the SRSRA and let them know about the organization and the work that we do. The BOD is grateful for your membership.

SRS Update – Michael Budney, SRS Manager, DOE-SR

Mr. Budney provided an update on the SRS budget, current mission priorities, and retiree support. The Administration's FY2024 budget request includes \$1.739B for SRS-EM. Key SRS-EM mission priorities include 1) continue disposition of tank waste; 2) continue Saltstone Disposal Units construction; 3) maintain H Canyon in a high readiness state; 4) construct a new Emergency Operations Center; 5) direct funding of SRS legacy pension; and 6) Payment In Lieu of Taxes, community, and regulatory activities. SRNL (operated by BSRA) is transitioning to a separate entity. It will operate as a Federally Funded R&D Center, allowing it to expand its business base.

The overall SRS funding profile is 47% EM, 51% NNSA, and 2% Work for Others. The NNSA's mission is increasing, while EM's is flat near term. The SRS landlord authority is, therefore, transitioning from EM to NNSA, with transition to be completed in 2025. There will be no impact to Site employees. Recruitment and hiring for open positions will continue.

There has been a concerted effort to bring the SRS Pension Plan funding to 100% funded. Through a change to annual level funding instead of ERISA (minimum required funding), the SRS Pension Plan is now almost 100% funded. The DOE values the work and contributions of SRS retirees and is committed to continued engagement and open dialogue with the SRSRA and working together to find solutions to issues through active participation in the SRSRA Annual Meetings and quarterly meetings with the SRSRA Executive Committee, accessibility to the SRS Contractors Benefits Team for information and assistance, continuous improvement on claims filing and reimbursements, ensuring pension obligations are met, and advocating for the SRSRA Resource Center. DOE-SR pays attention to what you, the retirees, say and request.

SRSRA Resource Center (RC) Update – Don Stevenson, SRSRA

The SRSRA RC provides free employee benefit assistance to SRS retirees by working with retirees and their families, SRS prime and benefits contractors, and Medicare providers. Services include assistance in selecting and enrolling in Medicare insurance plans and in filing reimbursement claims. The RC also offers monthly Age-In Training sessions and in-person appointments.

The SRSRA worked with the SRS Benefits Team to establish tiered annual stipend allocations as well as two stipend increases. Since RC inception through 3/2023, 1044 participants have attended Age-In Training sessions, over \$3.9M in Health Retirement Account claims have been processed, and 3667 prescription drug plan reviews have been conducted resulting in over \$3.2M in savings for retirees.

Questions and Answers Session - Moderator: Gene Dixon, SRSRA; Panelists: Paradio Maith, DOE; John Greenquist and Cary Holbert, SRNS; John Veldman, Don Stevenson, Dave Fauth, SRSRA.

Previously submitted questions were answered. A summary of the questions and answers provided follows:

Tax Documents

- What calendar date can retirees expect to receive tax documents, e.g., W-2 and 1099? SRS documents always seem to be late.

Answer: Tax documents are mailed by January 31. Contact the SRNS Customer Service Center (service-center@srs.gov or 803-725-7772) for address changes.

Cost of Living Adjustments COLA)

- Inflation has exceeded 5%; health care costs are rising even faster. When can the retirees expect to receive COLA increases in pensions and health care stipends? It's been over 20 years since we have received a pension adjustment.

Answer: Obtaining a pension adjustment/increase is the SRSRA's highest priority activity. We have submitted a request through the formal process for a 9% pension increase. The request was forwarded by the SRNS Benefits Team to the actuary to determine the amount of funding that would be needed for the 9% pension increase. The actuarial analysis result was that \$141M would be required to fund this increase. The increase request and actuarial analysis have been forwarded to DOE Headquarters. The additional monies must either be included in the budget appropriation request or added to funding bills. The SRSRA BOD is contacting staffers of our representatives in SC and GA to initiate these discussions.

Pension Fund

- DuPont always set aside a certain amount of money above the ERISA minimum for pension funding. In the years following, those dollars were diverted to mission work. When will they be restored?

Answer: DOE set up an insurance contract and deposited the estimated pension liability into that account. That account is a DOE asset. When DuPont calculated the pension contribution from SRS, DOE would pay from this fund. By October 1988, there was \$1,357M in that account. In April 1989, as part of the transition from DuPont to WSRC, DOE contributed \$725M from the account for the pension liability of terminated vested DuPont employees. Then DOE took another \$246M from the account and transferred it to DuPont to transfer to the WSRC pension fund. That deposit overfunded the pension by 39%. No additional contributions were needed/made for several years. That left \$386M in the account. In the 1990s, DOE had immediate funding issues. DOE weighed those needs and chose to draw from the remaining \$386M asset to pay for the mission/operational needs which included some of the required pension contributions during that time.

Pension plan discussions among SRSRA, DOE, and our representatives have been a driving force in changing from annual ERISA minimum required contributions to annual level funding contributions to the plan. As a result of these level funding contributions, our pension plan is now almost 100% funded.

Health Care Insurance Decisions

- What is the best way for retirees, or pre-retirees, to learn about optimized health care insurance decision-making? Are there classes? Is there one-on-one counseling? How do I make it happen?

Answer: The SRSRA website and our Facebook page provide information and a forum to interact on issues. The SRSRA offers monthly Age-In Training at the Lessie Price Senior and Youth Center in Aiken. Either contact the SRSRA Resource Center or use the "Contact" button on the SRSRA website to contact us for enrollment. The SRSRA Resource Center also provides counseling during the Medicare Drug Plan Open Enrollment period.

SRNS informed us that the RightOpt contract (through Conduit) will end in September 2023. SRNS is working to set up a new vendor for this process. Communications to follow.

SRSRA Membership

- How do I know if my SRSRA membership dues are current? How do I pay my dues? How do I become a member?

Answer: SRSRA membership is by calendar year, irrespective of when dues are paid during the year. In February we send out year dues reminder letters to those who have not yet renewed their annual membership. You can contact the Resource Center or use the “Contact” button on the SRSRA website to ask if your membership is current. The newsletter is only sent to paid members, so if you are not receiving the quarterly newsletter, your membership is not current.

ORA/SRSEA (SRS Employee Association)

- What is the status of the ORA? What happened to all the money after the site was sold?

Answer: The SRSEA (formerly ORA) is an independent organization. The store is indefinitely closed. The organization is currently restructuring. The SRSRA continues to receive funding from the SRSEA for gas cards and the Resource Center.

Personal Benefits Issues

- How can members contact the appropriate SRS offices/people with unique/personal benefits issues?

Answer: Contact the SRNS Customer Service Center at 803-725-7772 or e-mail service-center@srs.gov and your request will be forwarded to the right person for response.

WageWorks

- How do we contact someone who can advise/resolve WageWorks claims problems and issues?

Answer: You can try to call Health Equity/WageWorks directly and ask to speak to a supervisor. The SRSRA Resource Center will also work with you on documentation needed by WageWorks to resolve your issue.

SRSRA Annual Meeting

- Why haven't the SRSRA annual meetings been occurring regularly? When is the next meeting?

Answer: The annual meetings were temporarily halted due to the pandemic and our need to be consistent with the requirements of our venue. The meetings were re-initiated on 4/25/2023. The next annual meeting is currently scheduled for 4/18/2024.

United Way

- How does the SRSRA fit in with UW donations?

Answer: The SRSRA has conducted a member solicitation for United Way for the eight plus years. The monies go directly to the United Way. The donations are one-time contributions. Look for the form on the last page of our October newsletter.

Energy Employees Occupational Illness Compensation Program (EEOICPA)

- Where can we obtain information about EEOICPA?

Answer: Go directly to our district Department of Labor (DOL) Division Energy Employees Occupational Illness Compensation (DEEOIC) office. The group is independent, very helpful and competent. They will lead you through the process that includes a dose reconstruction and a medical diagnosis needed for the “white card”. The DOL “white card” provides the healthcare benefits related to the diagnosis. Contact information is as follows:

Savannah River Resource Center (Department of Labor)
1708 Bunting Drive
North Augusta, SC 29841
803-279-2728 or 866-666-4606

There are a lot of organizations commercially offering “assistance” with forms. Please be aware that these companies have a monetary stake in your compensation. They do not offer anything above what you will get free from the district office listed above.

SRSRA Newsletter

- How do we get on distribution for the SRSRA newsletter or change our address?

Answer: The newsletter is sent to all current SRSRA members. To change your address, either contact the Resource Center or use the “Contact” button on the SRSRA website and provide the new contact information.

General Business – Gene Dixon, SRSRA

- The minutes of the 2019 SRSRA Annual Meeting were approved.
- The proposed Board of Directors slate was approved.

Door Prize Drawings – Gene Dixon, SRSRA

The following ten members were randomly selected to receive \$100 gas cards: Ken Brooks, Kelly Ackeman, Shirley Patterson, Ken Green, Bruce Cadotte, Wade Bickford, Andy Cwalina, Ronnye Eubanks, Phil Zapp, and Gary Driesen.

Adjournment – Gene Dixon, SRSRA

The meeting was adjourned at ~ 2:30pm.