

isuaa news

"ISUAA – serving annuitants and survivors since 1971"

2003-2004 Issue No. 1, August 1, 2003

Co-Editors, Jack Hobbs and Parker Lawlis

Illinois State Annuitants Association Newsletter
Published Quarterly
Illinois State University, Normal IL 61790-1300

PRESIDENT'S MESSAGE

Parker Lawlis

Great News from the membership committee—we have more than 675 dues paying members as of July 10, 2003. This is great news as the Illinois State University Chapter of SUAA would like to be the first this year to go over 1,000 members. At the June SUAA meeting in Springfield, there was and continues to be a need for all of the participants in the SURS to become members of this organization. The Board still likes for members to use the dues deduct form when paying their dues, it would make things much easier on the bookkeeping and the treasurer.

As you all know, Governor Rod Blagojevich may not have all of the spending and financing of the State of Illinois budget in place. There are three potential problems that can surface regarding our pensions: (1) the State may want to have all pensions taxed (3%), (2) the State may want to remove the 3 % annual increase in our pensions on January 1, and (3) the State will negotiate with the employees a new health care plan in the next two years. These are "BIG" ticket items for all members, thus the need for our state SUAA and SURS to be very active in

protecting our benefits. The leadership of both of the groups is very concerned with politics in Springfield and the deals that have been made and are continuing to be made without a lot of discussion.

We can be happy with where we are with membership, but all of us must be aware that your vote and your influence and contact with our local elected legislators is very important.

With this in mind, we are preparing an e-mail list to contact you at any time the items seem to be of utmost importance to you, the membership. Your e-mail address can be included on the dues form.

We thank board members Barb Perry, Jean Grever and Gary Ramseyer for serving us very well. Congratulations to incoming board members, Andy Nappi, Jude Boyer, Christ Schwelle and Sharon Quiram as vice president. I want to thank all of the volunteers and board members who have been supportive of the ISUAA and ISU. We had a good year last year and we are working hard to have a better one this year. THANKS, IT'S YOUR ORGANIZATION!

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OUR OFFICERS FOR 2003-2004

President: Parker Lawlis
Vice-President: Sharon Quiram
Secretary: Marilee Rapp
Treasurer: Paul Schertz

Board Members:
 Jan Cook
 Andy Nappi
 Christ Schwelle
 Jude Boyer

OUR COMMITTEE CHAIRS FOR 2003 - 2004

Insurance
 Yvonne Houghman
Golf Committee (for 2003 season)
 Frank Matsler
Nominating Committee
 Peter Whitmer
Social Committee
 Barbara Glenn

Legislative Committee
 Tom Wilson, Co-chair
 David Wiant, Co-chair
Membership Committee
 Don Kachur
State Association Directors
 Edna Johnson
 Chuck Taylor
 David Strand
 Parker Lawlis

ISUAA TASKFORCE TEAMS FOR 2003-2004

Archivist: Jo A. Rayfield
Historian: Elaine Dunbar
Auditor: Chuck Taylor
Web Page Designer: Richard Erzen
Chapter Directory:
 Donna Meador
 Shirley Bottomley
Survivor's Advocacy Team:
 Eugene Irving
Computer Assistance
 Jan Cook
Publicity:
Newsletter:
 Jack Hobbs
 Parker Lawlis

ISUAA SPONSORED MEETINGS AND EVENTS:

“55 Alive Driver Safety Program”
 Monday, September 8, and Tuesday, September 9, 2003, from 8:30 a.m. to 12:30 each day. Special Seminar: “55 Alive Driver Safety Program” materials prepared by AARP. Calvary United Methodist Church, 1700 N. Towanda (corner of Raab and Towanda, north Normal). Five good reasons to take the course: Develop driving techniques, age-related changes, insurance discount, you don't have to take a test, and others are taking the course. Reservations are required for this program. A reservation

form is included in the newsletter. The fee is \$10 per person and enrollment is limited to 30. Send reservations to ISU, Human Resource Services, P.O. Box 1300, Normal, IL or Parker Lawlis (452-5309) is taking applications. (Deadline-Sept. 1)

"Handling an Estate"

Tuesday, September 30 and Thursday Oct 2, 2003, from 10:00 a.m. to 11:30 a.m. each day. Special Seminar: "Handling an Estate", Spotlight Room, Bone Student Center. Back after a sell out last fall and spring!!! What needs to be done when a family member or a friend dies? Handling an Estate can be an overwhelming task. What kind and how do you get financial information in order? Where do you find needed estate information? Diane Ryon will help you find the answer to these and other questions. Reservations are required for this program. A reservation form is included in the newsletter. The fee is \$6.00 per person and enrollment is limited to 30. Send reservations to ISU, Human Resource Services, P.O. Box 1300, Normal, IL. Parker Lawlis (452-5309) is taking applications. (Deadline Sept. 23)

Fall Luncheon September 10, 2003— (Serving at 11:30 a.m.)

For the luncheon, we are having sliced Roast Beef with Demi Bourbon sauce, parsley potatoes, baby carrots, tossed salad and for dessert carrot cake and or walnut layer cake - rolls and butter, coffee, tea and water. The price per person is going to be \$9.00. The deadline for reservations will be September 6, 2003. Contact Barb Glenn, 56 Ravenwood, Bloomington, IL. 61704

University Sponsored Events

The following events are offered and paid for by University Advancement. All retirees of ISU are invited to attend these functions. Reservations are required. You will receive a special invitation and be asked to phone in your reservations. It is important to make reservation in order for the sponsor to arrange for food and refreshments. It is equally important for you to cancel your reservation if for some reason you will not be able to attend the event. Events and dates to be announced.

Computer Classes

According to Julie Caplinger, "We have decided to hold off on the Annuitant classes until spring semester due to budget cuts and lay offs. Students may however register for any of the classes we are offering by calling 438-7377. Many of the classes are very similar. Thank you and if you have any questions you call me @ 438-7582. I am having surgery July 18 and will not return to work until August 6."

"Coffee with Someone!!!!

Something New! We are going to try to have a coffee hour on the four Thursdays in September (Sept. 4, 11, 18, and 25) at 9:30 a.m. at the Faculty Commons in the Bone Student Center. A speaker/and or a moderator will preside. The contacts have not been made yet but will have them available. Participants can purchase the coffee at the bar outside the Lounge. Possible topics with speakers are: Long Term Care, Social Security, Investments, Local politicians-not the Town of Normal.

"Tee Birds"Golfers

The "Tee Birds" are having a great time playing at Royal Links and a few rounds at ISU. The scores have not matched the "pro" tour as yet, but players in the group are getting very proficient around the green and putting. Getting to the green is still a challenge for some. The members are taking turns acting as the "morning starter" and Russ Steele is the "score keeper". Some have noticed "favors" (big erasers) being passed out after the matches and before the scores are turned in to Russ.

ISUAA LEGISLATIVE REPORT Tom Wilson, Legislative Co-Chair

About a year ago, in August of 2002, Gov. Ryan signed legislation that helped actives, those with disabilities and survivors. It made the "30 and out" provision permanent, increased the minimum benefit for survivors, reinstated the survivor's benefits for those who remarried before age 55, and provided a 3% yearly increase for those on disability. Retirees and actives held together in a coalition to get these improvements, even though some of the university lobbyists wanted to dump the survivors from the bill.

I think this law demonstrated that we could get some things done if we work together, and we will all hang separately if we split into the petty factions that too often pervade university life. Working together will be especially important in the next few years, as the political leadership in Illinois is definitely out to get public higher education.

In the next two or three years we can expect the State to try to eliminate or reduce benefits for university and community college employees and

retirees. In particular, I believe the targets will be:

1. Health benefits. Note Parker's remarks in the President's message.
2. The 3% compounded increase in pensions. The compounding in effect doubles your pension if you live for 24 years after you retire, whereas it would take 33 1/3 years without compounding. There is some talk in Springfield to eliminate the compounding for everyone and reduce the 3% to 1 or 2% for future retirees. Parker notes in his President's message that the State may want to eliminate the 3% annual increase for everyone. This is a possibility, as I believe the Governor and his close advisors have read Machiavelli's The Prince (1513). While they may not go to the extreme of killing us all quickly and at once, there is some political advantage in making one big move to hurt retirees rather than dragging it out in several in several small steps. Machiavelli suggested that the people will soon forget how brutal the Prince was and (with a good public relations machine) will grow to both fear and love him (by the next election).
3. The exemption of pension income from the Illinois income tax. Even many legislators think the exemption applies only to public pensions, but in reality it applies to all pensions. Thus, the pensions of State Farm retirees are exempt in the same way as our pensions as State of Illinois

retirees, but most people think we're getting some special break.

I hope I'm wrong about the Springfield scene, but right now it smells bad to me. And as many of us in Bloomington-Normal know after cleaning sewer water out of our basements from the "once in a Century" storms of July 8 – 10, if something smells bad, it probably is bad.

ISUAA STRATEGIC PLAN

You may recall that the May newsletter included an item on a Strategic Plan divided into 5 priority clusters. The first two clusters were delineated in that issue. The following is about the three remaining clusters.

Priority Cluster 3

These activities aim to increase the effectiveness of chapter leadership, which is essential to the effectiveness of the Association.

- Encourage members to become involved in SUAA's plans to develop new leadership training programs.
- Consider the feasibility of involving a member of the SUAA Executive Committee to interact with chapter officers to improve relationships, communications, and cooperation, and consider the advantage of exchanging ideas and assistance with other chapters.

Priority Cluster 4

Strengthen support of the SUAA and ISUAA goals by the members of the chapter by supplying educational information regarding those goals.

- Continue the (chapter) practice of keeping members informed of significant local and state issues in its excellent newsletter.
- Continue to keep chapter members informed of needs, plans, and requirements of SUAA.
- Keep all parties informed of the SUAA and chapter financial commitments needed to continue to move the organizations forward.
- Offer suggestions for content and improvement of the SUAA website and explore appropriateness of establishing a chapter website.

Priority Cluster 5

Provide personal and informational services and activities for chapter and Association members.

- Participate, when and as deemed appropriate by SUAA, in surveying programs and services, and in advising SUAA and chapter member of the survey results.
- Offer a suggestion to SUAA that consideration be given to contacting Sam's Clubs to establish an SUAA group membership discount for the purchase of goods. (ISUAA questions the value of this.)

The Illinois State University Annuitants Association has presented its annual Achievement Award for outstanding service to Thomas Wilson, emeritus associate professor of the political science faculty.

Wilson joined the Annuitants Association when he retired in 1992 and made an immediate impact on the organization through his tireless work in legislative relations. He has chaired the State University Retirement System's legislative committee since 1996 and has been co-chair with David Wiant of the ISUAA legislative committee for many years.

Wilson helped lead the drive to increase minimum benefits for survivors of deceased retirees during the last legislative session. Before then, some older survivors were limited to pensions as low as \$200 a month. Now they can receive \$17.50 for each year of service up to 30 years, potentially raising their pensions to as much as \$525.00.

This is the fifth year in which the ISUAA has presented an Achievement Award. Previous winners were the late Francis Brown, Yvonne Hougham, Edna Johnston and David Wiant.



**TOM WILSON, recipient of the
ANNUAL ACHEIVEMENT AWARD**



Above: Barb Perry and Gary Ramseyer at the Annual Meeting. Both are retiring from the Board, along with Jean Grever who was not able to attend.

Below: Gene Hunter, who retired from ISU with more than 52 years of service, receiving an ISU shirt inscribed with “Hunter 52” on the sleeve from President Parker Lawlis.



RESERVATION FORM FOR THE FOR THE FALL LUNCHEON MEETING

Wednesday, September 10th, 2003, Serving: 11:30 a.m. BALLROOM of Bone Student Center

Names of those attending _____

Reserve _____ meals at \$9.00 each. Total amount \$ _____

Make check for total amount payable to: ANNUITANTS ASSN., and mail check and this reservation form by September 6, 2003 to BARBARA GLENN, 57 Ravenwood Circle, Bloomington, IL 61704

TELEPHONE DIRECTORY UPDATE

The Benefits Section is updating the Retirees section of the ISU telephone directory. Please check your name, address, phone number, and e-mail address in last year's ISU telephone directory. If any of the information is incorrect, please enter the corrections below and return it to the Benefits section at Illinois State University (Campus Box 1300). Please respond by August 15, 2003, in time for the new directory.

NAME _____ PHONE #: _____

ADDRESS _____

E-MAIL ADDRESS _____

DUES PAYMENT STATUS
Paul Schertz, ISUAA Treasurer

You may check on your dues payment status by referring to the mailing label on your most recent newsletter. Some examples are: "DUES YR 02/03" This means that your dues are paid through the 2002-2003 year ending June 30, 2003; "DUES YR 03/04" This means that your dues are paid through the 2004-2004 year ending June 30, 2004; "DD702" This means you have signed up to have your dues deducted from your annuity check. You signed up in July of 2002. A " DD703" code would mean your dues deduction began in July of 2003, an "DD803" would mean August 2003 etc. If you have signed up to have you dues deducted, you do not need to re-enroll each year.

RESERVATION FORM FOR THE PROGRAMS (on page 3)

_____ "55 Alive Driver Safety"—September 8 and 9. Cost \$10.00 per person

_____ "Handling an Estate"—September 30 and October 2. Cost \$6.00 per person

Names of those attending _____

_____ Phone # _____

Enclosed is \$ _____. Make checks payable to ISUAA. Mail to ISU Human Resources, Box 1300, Normal, IL 61790-1300 or contact Parker Lawlis (452 5309)

WHY SHOULD YOU JOIN THE ANNUITANTS ASSOCIATION?

**Illinois State University Annuity Association (ISUAA)
State University Annuity Association (SUAA)**

Join for a financial PURPOSE!

* The Associations work through state legislators and the governor's office to improve retiree and survivor benefits. Examples of these successes are...

* Gaining a 3% annually compounded annuity increase that will, for example, provide \$164,889 extra income in the first twenty years for an annuitant initially receiving \$24,000 annually.

* Gaining approval of Senate Bill 95 that provides for improved funding of the annuity program, and approval of other bills that assure funding for that bill.

* The ISUAA efforts at the local level have gained benefits for retirees, such as reduced golf fee passes at the ISU Golf Course, Complimentary theatre tickets, computer courses for annuitants, and the opportunity to serve on ISU committees and sub-committees.

* The Associations produce newsletters that provide information on retirees' and survivors' benefits, pending legislation, and matters affecting members.

Join for personal PLEASURE!

* Membership provides an opportunity to maintain contact with retired colleagues and to meet new ones through special dinners and events.

* Members of ISUAA can attend 5 meetings a year to obtain the latest information about benefits and enjoy entertainment and socialization.

ANY ONE OF THE ABOVE BENEFITS IS ENOUGH TO JUSTIFY THE \$25 MEMBERSHIP FEE! So, if you are a retiree, or if you are working but are eligible for an annuity, a retired spouse, an annuitant spouse, or a surviving spouse, **JOIN NOW AND HELP US RETAIN AND IMPROVE YOUR RETIREMENT PACKAGE!**

HOW TO BECOME A MEMBER OF THE ANNUITANT ASSOCIATIONS

Membership Categories and Fees (Membership year: July 1st to June 30th)

The membership is considered a package, including both ISUAA and SUAA.

To join ISUAA, you must also join SUAA.

The fee for membership in **both** associations is \$46 (SUAA dues are \$38, ISUAA dues are \$8).

You may also voluntarily give to the **SUAA Foundation** by adding \$1 to your dues. The Foundation provides information about legislation and social issues, as well as about health and legal benefits. It also recognizes members who serve, or who have served, the associations.

Both associations use the following eligible member categories:

ANNUITANT: Person receiving a SURS annuity now.

PRE-RETIRED: Person employed at ISU, but who is eligible to receive a retirement annuity.

SURVIVING SPOUSE: Spouse of a deceased annuitant, now receiving a SURS annuity.

SPOUSE: Spouse of an annuitant or pre-retired, not eligible for the other three categories.

(Pays only state dues, and receives a complimentary ISUAA membership.)

DUES DEDUCTION

Those who receive a pension from SURS, now have the option of having their local and state dues deducted from their monthly pension payment. If you are now receiving a pension and decide to take this option, please complete Form A and your dues will be automatically deducted for the coming year (July 1, 2003- June 30, 2004) and each year thereafter. If you select this option, complete Form A but do not send a payment. However, if you wish to make a contribution to the SUAA Foundation, you must send a check but only for the amount you wish to contribute. If at any time in the future you decide to return to the annual payment option, you may do so.

If you elect to pay your dues annually as you have in the past, please complete Form B and enclose your check.

ISUAA/SUAA DUES DEDUCTION AUTHORIZATION FORMS

Section "A"

If you want your ISUAA/SUAA dues deducted from your monthly annuity check*, please complete only Section "A". *As pre-retirees do not receive a pension check, they must pay their dues annually; please use Section "B".

Name _____

Spouse's

Name _____ Address _____

City _____ State _____ Zip _____ - _____ Phone

(_____) _____

e-mail address _____

Social Security Number*(self) _____ *SURS must have the SSN for its record keeping.

Winter address (if applicable)

Street _____ City _____ State _____ Zip _____ Pho

ne (_____) _____

I hereby authorize the **State Universities Retirement System (SURS)** to deduct each month the amount as certified by the **Illinois State University Chapter** of the State University Annuitant's Association as the current rate of dues. This deduction will start as soon as possible and will continue until I inform SURS otherwise. I also authorize SURS to provide change of address information to the chapter.

Dues: Retiree: \$2.08/month ___ Retiree and Spouse: \$3.83/month ___ Surviving Spouse: \$2.08/month ___

New Application _____ Renewal _____

Signed _____ Date _____

MAIL to ISUAA TREASURER, Illinois State University Annuitants Association, Campus Box 1300, Normal, IL 61790-1300

If you wish to make a voluntary contribution to the SUAA Foundation, make your check payable to the ISU Annuitants Association and mail it to the above address.



ISUAA/SUAA DUES PAYMENT FORM

Section "B"

If you do not want your ISUAA/SUAA annual dues deducted from your monthly annuity check or are a pre-retiree, please complete only Section "B".

Name _____ Spouse's name _____

_____ Address _____

City _____ State _____ Zip _____ Phone _____

(_____) _____

e-mail address _____

Winter address (if applicable)

Street _____ City _____ State _____ Zip _____

_____ - _____

Phone (_____) _____

Dues: Retiree: \$25.00 ___ Retiree and Spouse: \$46.00 ___ Surviving Spouse: \$25.00 ___

Pre-Retiree: \$25.00 ___

New Application _____ Renewal _____

MAIL to ISUAA TREASURER, Illinois State University Annuitants Association, Campus Box 1300, Normal, IL 61790-1300

If you wish to make a voluntary contribution to the SUAA Foundation, please include it in your check made payable to the ISU Annuitants Association and mail it to the above address.

EDITORIAL
David Wiant

It was March 1953 when I went to work for the University of Illinois in the Chicago Medical center and first became a member of the State University Retirement System. I have seen four different Directors of the System over the years and I have been witness to a number of changes, but always felt secure in where the System was going.

However, for the first time in the fifty years I have been associated with the System as an employee or an annuitant, I have serious concerns. In my opinion, it is time for the Annuitants to become active participants in the Annuitants Association. Active means to attend meetings, find out what is going on, what are the concerns and then pitch in by writing a personal note to our legislators and our Governor and let them know what you think.

You see, while the contributions are to be managed for the best interest of the members of the System, the Governor and some of his staff want to make changes. It has been proposed that Retirement System funds be combined and placed under the direction of the Illinois Investment Board. A Board whose investment returns have not been as good generally, as the returns obtained by the Systems investment officers.

There was also discussion of a legislative proposal, which would eliminate the Retirement System Board. These are just two of the reasons that I have serious reservations and concerns about our Retirements System

Despite the aggressive leadership of the Director, Jim Hacking, he can't do the job alone. Are you willing to help?

IT IS YOUR SYSTEM!!!!!!



Annuitants Association
Illinois State University
Campus Box 1300
Normal, IL. 61790-1300

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UNIVERSITY

WE REGRET TO REPORT THE DEATHS OF:

Wilma Doyne Miller	April 10, 2003
William J. Kirwan	April 16, 2003
Eddie L. Foley, Sr.	May 5, 2003
Ralph L. Lambert	May 6, 2003
Roy K. Donaldson	June 2, 2003
Robert W. Peterson	June 2, 2003
Katheryn A. McClintock	June 3, 2003
James C. McKee	June 4, 2003
Kenneth L. Beckman	June 10, 2003
Arthur L. Freyman	June 14, 2003
Ray W. Curry	June 17, 2003
Betty R. Mulligan	June 30, 2003
V. Alieen Lape-Brady	June 28, 2003
Robert E. Hemenway	July 3, 2003
Kevin E. Poland	July 7, 2003
Virginia Schnepf	

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