

Illinois State Annuitants Association Newsletter

ISUAAA



Volume 2 Number 1 Summer 2007

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ISUAA—serving annuitants and survivors since 1971

President's message

This issue of the ISUAA newsletter is distributed to all Illinois State University retirees, not just ISUAA members. In retirement we all have the same title “annuitant,” regardless of academic background or the position held while working. We share common concerns, such as the security of our pensions and maintaining quality health benefits. Those of us who earned Social Security benefits are dismayed that these are reduced because we also earned SURS pensions—even partial pensions. I hope non-members will consider joining to add to our membership numbers and influence. Certainly it is worth a couple of dollars per month to help protect what you worked so hard to earn. If you want to actively participate in ISUAA activities we'd love to have you do so, but if all you want to do is support our work by being a member, that's okay, too.

I want to take this opportunity to thank some people who have been actively involved in ISUAA. Sharon Quiram is leaving as vice president of our chapter after four years in that position. Paul Schertz is leaving the treasurer's position after six years; he will continue in his role as a state director. State director David Strand is leaving that post after eight years. Nominations committee chair Marilee Rapp is also leaving. Marilee previously served as chapter secretary. All four of these people have contributed greatly to making ISUAA one of the top chapters in the state.

Thanks also go out to the College of Fine Arts for sponsoring this issue of the newsletter. Once again, the college has a great schedule of performances with discount prices for annuitants. Also, I hope you can take advantage of the events that are part of Illinois State's sesquicentennial celebration.

Just prior to finalizing this newsletter we added to our schedule an informative program, “What SURS Participants Need to Know About Social Security/Medicare.” The presenter will be Bill Carter of the local Social Security office. This program is scheduled for Thursday, September 6, 12 noon–1 p.m., in the Old Main Room of Bone Student Center. Current faculty/staff and Illinois State University annuitants are invited to attend. For information contact Richard Dammers at rdammer@IllinoisState.edu or (309) 664-5921.

Christ Schwelle
ISUAA President



ISUAA organization, 2007–2008

ISUAA board

President Christ Schwelle (08)
Vice President Richard Dammers (09)
Secretary Carolyn Bartlett (08)
Treasurer Sue Killian (09)
Director Jude Boyer (09)
Director David Doss (09)
Director Janet Kuhns (08)
Director Tom Shilgalis (08)

Committee chairs

Golf	Pete Whitmer
Insurance	Yvonne Hougham and Bob Metcalf
Legislative/ SUA ACTION	Christ Schwelle and Dave Wiant
Membership	Christ Schwelle and Sue Killian
Nominating	Vacant
Pool	Christ Schwelle
Programs	Richard Dammers
Social	Shirlee Bottomley and Dona Meador
Survivors Advocacy	Mary Liverman
State Association Directors	Jan Cook (08) Richard Dammers (09) Christ Schwelle (08) Paul Schertz (09) Chuck Taylor (09)

ISUAA taskforce teams/resources

Archivist	Jo Ann Rayfield
Auditor	Chuck Taylor
Chapter Directory	Dona Meador
Foundation Liaison	Barbara Todd
Mailing List	Kathy Pollock and Sue Killian
Newsletter	Christ Schwelle, Richard Dammers, and University Marketing and Communications
Social Security Issues	Robert Hunt
Web Page	David Doss

ISUAA election results/ annual meeting summary

The ISUAA annual meeting and dinner was held in the Old Main Room at Bone Student Center on June 20, 2007. Richard Dammers was elected vice president; Sue Nolan Killian was elected treasurer; and Jude Boyer and David Doss were re-elected as directors. Continuing in their positions on the ISUAA board are Christ Schwelle, president; Carolyn Bartlett, secretary; and directors Janet Kuhns and Tom Shilgalis.

The Distinguished Service Award was presented to outgoing treasurer Paul Schertz, who served in that capacity for six years—the maximum allowed. Among Schertz's achievements was leading the initiative to establish payroll deductions for ISUAA dues payments from current university employees.

Committee and task team members were acknowledged for their service and Schwelle provided a summary of the work of the board during 2006–2007.

ISUAA year in review: 2006–2007

- ISUAA membership is currently 1,372, approximately the same as a year ago. SUAA membership is 15,140, compared to 14,262 last year. Payroll deduction for dues payments by those still employed by Illinois State was implemented this year.
- University personnel assistance for ISUAA began a transition from Human Resources to University Advancement/Foundation during the year. Barbara Todd, executive director of internal campaigns, is the designated university liaison to ISUAA.
- University-related financial support, including newsletter sponsorship, grew from 30 percent of the chapter budget to 35 percent. This allows dues to remain very affordable while keeping ISUAA in the black financially.
- ISUAA published four newsletters to keep members informed about issues affecting them. University Marketing and Communications (UMC) is now doing the newsletter layout. The annual chapter directory continued to be published, currently with the assistance of University Advancement and UMC. ISUAA continues to maintain a Web site (www.annuitants.ilstu.edu). Added this year was a legislative section.
- Human Resources had to cease providing information on retiree deaths/survivors to the ISUAA Survivor Advocacy Team in late fall. This action was necessitated by recent ethics legislation. An interim plan for obtaining information is in effect and a new plan is being developed. ISUAA worked with University Advancement to include survivors on the invitation list for semiannual retirees' breakfasts.
- ISUAA had an annual dinner meeting plus three luncheons. The 35th anniversary of ISUAA was celebrated at the

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Volume 2, Number 1, Summer 2007

Published quarterly

Illinois State University Annuitants Association
Campus Box 1300
Normal, IL 61790-1300
www.annuitants.ilstu.edu

December holiday luncheon. At each of these events canned goods and other items were collected for local charities.

- ISUAA was represented at all three SUAA statewide meetings. The past president of ISUAA, Jan Cook, is on the SUAA executive board and the current chapter president is treasurer of SUAA's political involvement committee, SUAACTION. ISUAA members voluntarily donated over \$11,000 to SUAACTION in 2006–2007.
- ISUAA's legislative/political group continued to maintain a positive relationship with local legislators. A Social Security penalties interest group was formed this year.
- ISUAA members continue to be the nucleus of the University Club, which holds weekly discussion hours and two gourmet dinners each semester. ISUAA also coordinated activities in golf and pool for its members.
- Projects in the works include formalizing the relationship between ISUAA and the Illinois State University Foundation, organizing ISUAA archives, clarifying and possibly expanding Illinois State University survivor privileges, and exploring an intergenerational learning initiative.

A/P staff brown bag session

On April 18, the Administrative/Professional Staff Council sponsored a brown bag session, "What's Happening with Your Retirement Benefits?" The panelists were Bone Student Center's Jim Carlson, chair of the SURS Member Advisory Committee and ISUAA President Christ Schwelle. There was an overflow turnout of current university employees concerned about what lies ahead as they approach retirement.

Intergenerational leadership forum

On April 23 ISUAA members Janet Bremner and Christ Schwelle represented Illinois State University at the Illinois Senate Forum on Intergenerational Leadership. College students and retirees from across the state convened in the Illinois Senate Chamber for this meeting led by Senate President Emil Jones Jr. One of the examples cited as a successful initiative for bringing generations together, with positive results, was Illinois State's Senior Professionals program, in which retired professionals mentor college students.

Are your retirement benefits secure?

This issue of the newsletter is a good time to assess the security of our retirement benefits. Despite the underfunding of pensions, the negative attitude (perhaps hostility in some cases) of citizens toward public pensions, and trends in the private sector, your pensions are relatively safe. This is true for those still working in "the system" as well as retirees. The State has an enforceable contractual obligation to pay pensions, including the 3 percent annual increment.

That said, leaders in the business community believe that pensions for public employees are too generous and the State should not be locked into not being able to diminish pensions. Such thinkers may attempt to use a State constitutional convention (con-con) to eliminate or modify the state's constitutional obligation. Other interest groups will not want a con-con because it could open up a real can of worms on a variety of issues. If a con-con did occur and the State did attempt to eliminate or modify its pension obligation, legal action could be brought against the State on the grounds that benefits earned under properly enacted legislation cannot be cancelled out. It is like the *ex post facto* principle in criminal law. It helps that we paid our share to help fund the system and the annual increments. The role of SUAA and others advocating for retired public employees is to closely monitor the situation and take the steps necessary to maintain the State's obligation. For more information on con-con see Tom Wilson's article, "Illinois Constitutional Convention and Pension Rights" in the May 2006 issue of the ISUAA newsletter available at www.annuitants.ilstu.edu.

Health insurance benefits are an area where we are more vulnerable. There is no protecting constitutional provision. The existing pattern, which is expected to continue, is that the American Federation of State, County, and Municipal Employees (AFSCME) will be negotiating health insurance benefits with the State and everyone affected will live with the results. AFSCME has a good track record and seems to be committed to protecting retirees.

Other continuing issues of concern include eliminating or modifying Social Security offset penalties and the potential for taxing State pensions.

ISUAA discounts for performing arts events

By Brandon C. Burling, General Manager,
College of Fine Arts box offices

Illinois State University's College of Fine Arts is again pleased to announce a special ticket rate for ISUAA members: student rates of \$8 for tickets to any MainStage theatre production, and \$4 or \$7 to any Gold Series music event in the Center for the Performing Arts, except as noted.*

2007–2008 MainStage productions in the CPA Theatre

The Who's Tommy

Inspired by the 1960s rock opera

October 5, 6, and 10–13 at 7:30 p.m.; October 7 and 14 at 2 p.m.

*Tickets for *The Who's Tommy* will be \$10.

Relatively Close

A world premiere by Illinois State alum James Sherman

November 7–10 at 7:30 p.m.; November 11 at 2 p.m.

Cider House Rules: Parts 1 and 2

Based on John Irving's novel

Part 1: February 21, 27, and 29 at 7:30 p.m.; February 24 at 2 p.m.

Part 2: February 22, 26, and 28 at 7:30 p.m.; March 2 at 2 p.m.

Opportunity to view Parts 1 and 2 in the same day on February 23 and March 1—Part 1 at 2 p.m. and Part 2 at 7:30 p.m.

The Merry Widow

An opera produced in partnership with the School of Music

April 4, 5, and 10–12 at 7:30 p.m.; April 6 at 2 p.m.

*Tickets for *The Merry Widow* will be \$10.

Fall and Spring Dance Concerts

Illinois State Dance Theatre faculty, guest artists, and students showcase their talent

Fall: December 6–8 at 7:30 p.m.; December 8 at 2 p.m.

Spring: May 1–3 at 7:30 p.m.; May 3 at 2 p.m.

2007–2008 Gold Series music events in the CPA Concert Hall

Illinois State University Symphony Orchestra

September 20 at 8 p.m. (\$4)

Bands Prism

October 12 at 8 p.m. (\$4)

Illinois State University Symphony Orchestra, Concert Choir, and Civic Chorale

October 28 at 3 p.m. (\$7)

Wind Symphony

November 15 at 8 p.m.; February 17 at 3 p.m. (\$4)

Music for the Holidays

December 2 at 3 p.m. and 7 p.m. (\$7)

Concerto Aria: Illinois State University Symphony Orchestra

February 28 at 8 p.m. (\$4)

Jazz Festival with special guest artist

April 5 at 8 p.m. (\$7)

Choral Collage

April 27 at 7 p.m. (\$4)

Tickets may be obtained by calling the CPA box office at (309) 438-2535 or visiting during our regular business hours (12 noon–5 p.m., Monday–Friday). Beginning August 11, all tickets will be available online and at all Ticketmaster outlets. ISUAA members must inform the box office of their membership in order to receive this discount. Please pick up your tickets no later than 15 minutes prior to the performance.

More information is available on our Web site at IllinoisState.edu/finearts.

Hope to see you all this season!

ISUAA directory update

Please use this form to correct information in the 2006–2007 chapter directory (yellow cover). Please respond by August 28, 2007. If the information in the 2006–2007 directory was correct/complete you do not have to complete this form.

Name _____

Spouse's name _____

Telephone _____

Address _____

E-mail _____

_____ I would like this information forwarded to Illinois State for the university directory.

Send to ISUAA, Campus Box 1300, Normal, IL 61790-1300.

150th gala set for homecoming

Cap off Homecoming 2007 by being a part of the University's Sesquicentennial Gala on Saturday, October 13. This special evening of celebration begins at 6 p.m. in the Brown Ballroom, Bone Student Center, with dinner and entertainment.

President and Mrs. Bowman will host the event, which will include celebrity alumni. The talent of students, faculty, and retirees will also be showcased.

A live and silent auction featuring items found only at Illinois State will be another highlight of the "red-tie affair" designed to "Spread the Red" during the University's 150th anniversary year. The evening will conclude with jazz after hours.

Reserve your seat today with the purchase of a \$150 ticket, a portion of which is tax deductible. Funds raised through the gala will benefit several scholarships, including the Bowman Fellows, Bone Scholars, Presidential Scholars, and the Olamide E. Adeyooye Memorial Scholarship.

For ticket information, contact Barbara Todd at (309) 438-2592 or bttodd@IllinoisState.edu.



ISUAA calendar

September 5, 2007

ISUAA fall luncheon
11:30 a.m.–1:30 p.m., Old Main Room, Bone Student Center

September 6, 2007

“What SURS Participants Need to Know About
Social Security/Medicare”
12 noon–1 p.m., Old Main Room, Bone Student Center

September 12, 2007

ISUAA board with committee chairs
2–3:30 p.m., Spotlight Room, Bone Student Center

September 25, 2007

Fall Advancement retiree breakfast
8–9:30 a.m., Brown Ballroom, Bone Student Center

October 2007

SUAA board fall meeting
TBA

November 14, 2007

ISUAA board with committee chairs
2–3:30 p.m., Spotlight Room, Bone Student Center

December 5, 2007

ISUAA holiday luncheon
11:30 a.m.–1:30 p.m., Brown Ballroom, Bone Student Center

150th celebration events

September 18, 2007

Award-winning author/historian Doris Kearns Goodwin

October 13, 2007

Homecoming Sesquicentennial Gala

November 1, 2007

Award-winning documentary filmmaker Ken Burns

November 8, 2007

Country music superstar and nurse Naomi Judd

November 14, 2007

Award-winning author on education and urban issues
Jonathon Kozol

*Note: A number of other sesquicentennial events are scheduled.
Up-to-date information is available at IllinoisState.edu.*

In memoriam

Helen Bass	June 11, 2007
John Ferrell	June 22, 2007
Janet Hildreth	April 11, 2007
Zona Kiesewetter	April 16, 2007
Minnie Lamb	April 23, 2007
Cecilia Lauby-Ryan	May 25, 2007
Beatrice Molloy	June 15, 2007
M. Mildred Stalter	April 7, 2007
Arthur Willan	June 20, 2007

Alumni tailgate tent

All retired faculty and staff are invited to stop by the Alumni Association’s pre-football game tent, co-sponsored by ISUAA, during homecoming festivities on Saturday, October 13. The tent will be located in the Redbird Tent Zone, just west of the University High School parking lot, and will be open from 10:30 a.m. to 1:30 p.m. What a great chance to visit with other retired employees as well as alumni from near and far. Refreshments include free mini-gondola snacks. There is no cost to attend this event, but advance reservations are encouraged. Contact the Alumni Relations office at (309) 438-2586 or isualum@IllinoisState.edu to make your reservations.

To purchase your football game tickets, contact the Redbird ticket office at (309) 438-8000. Kick-off is set for 1:30 p.m. against the Sycamores of Indiana State University.

Alumni Relations and the Alumni Association host a variety of events for alumni and friends, and retirees are invited. For additional information on such events and the latest information on homecoming, please visit www.alumni.ilstu.edu/events. Online registration is available or you may call the office at (309) 438-2586.

Dollars for Scholars

In recognition of Illinois State University’s 150th anniversary celebration, a philanthropic initiative called “Dollars for Scholars” has been created for the sesquicentennial year. The initiative will help build the endowment of four scholarship funds to ensure that financial assistance is available for future outstanding students at the University.

Donors who give \$150 or more will be recognized as Dollars for Scholars donors with special campus-wide recognition. The fundraising effort will support Bowman Fellows, Bone Scholars, Presidential Scholars, and the Olamide E. Adeyoye Memorial Scholarship. For additional information or to receive a pledge card, please contact Barbara Todd at (309) 438-2592 or bttodd@IllinoisState.edu.

University Club events—fall 2007

Jude Boyer

Gourmet dinners

The cuisine of the Atlantic Northeast will be featured on Friday, September 28, in the Old Main Room at Bone Student Center. The dinner on Saturday, November 4, will be held in the Circus Room and feature Indian cuisine. Full information about each menu and reservation details should be available to all by August 24 on the University Club Web site: www.lilt.ilstu.edu/uclub/gourmet.htm. University Club members will receive a mailing in mid-August.

Discussion hours

The first discussion hour of the fall semester will be held Friday, August 24, from 3:30 to 5:30 p.m., in the Faculty/Staff Commons, Bone Student Center. Please join us for refreshments and lively conversation. Discussion hours are held on most Friday afternoons of the academic semester from 3:30 to 5:30 p.m. in the Bone Student Center Faculty/Staff Commons. Special discussion/information topics are noted on the University Club Calendar Web site: www.lilt.ilstu.edu/uclub/calendar.htm.

University Club is a great way to meet members of the University community. Membership is open to all current and retired faculty and staff of Illinois State University.

Further details about the University Club may be found at the following Web site address: www.lilt.ilstu.edu/uclub.

The Senior Professionals

Fall Academy lineup

- We'll Always Have Movies: American Cinema During WWII
- Everything You Wanted to Know About Reading Plays (But Were Afraid to Ask)
- The Birth of a New Nation: 1783–1800
- Discovering Latin America
- Religion in the Public Square

Mornings with the Professors programs

- Does the President Have Unilateral War Powers?
- A Brief History of the American Denial of History
- Ethics, Leadership, and Culture: The Hallmarks of Good Business
- Illinois State's 150th Birthday Bash: New Perspectives on the University's History
- Traditional Field Studies in Geology: Still Important?

For information or to have a brochure sent to you please call (309) 438-2818.

SUAA annual meeting summary

Delegates from ISUAA attended the State Universities Annuity Association (SUAA) annual meeting in Springfield on June 13 and 14. Chapters from throughout the state were represented. Among the speakers were Dan Slack, executive director of SURS; State Representatives Rich Brauer and Robert Prichard; Jim Reed of the Illinois Education Association (IEA); and J. Thomas Johnson, president of the Taxpayer's Federation of Illinois. Brauer is a member of two pension-related committees and Prichard is a member of two higher education committees. Reed is IEA's director of government relations. Johnson's interest lies in monitoring the state's fiscal situation and assessing implications for possible changes in the state's tax structure. No one would hazard a guess on what the state budget or tax structure would look like. It was mentioned that interest groups would be looking to advocate for a state constitutional convention. This was the first annual meeting for new SUAA executive director Linda Brookhart.

The issues discussed by SUAA are familiar—inadequate state funding of SURS, health insurance benefits, the possibility of changes in the state's tax structure, and the potential of a state constitutional convention with possible retraction of the constitutional provision that prevents state pensions from being diminished. SUAA's legislative committee continues to analyze these issues and develop strategies. On the federal side of the ledger the Social Security offsets which penalize those receiving both SURS and Social Security benefits continue to receive attention. SUAA's political involvement committee, SUAACTION, continues to evolve. The voluntary fundraising campaign raised about \$127,000 in 2006–2007 to use for political activity. ISUAA was responsible for \$11,385 (9 percent) of the total amount. The amount generated will help SUAACTION improve our visibility and influence politically. SUAA continues to grow with membership now exceeding 15,000. ISUAA, with 1,372 members, represents 9 percent of the SUAA total.

SUAA decided not to pursue a dues increase at this time. The situation will be assessed again next year.

Illinois State University Annuitants Association membership form

Membership includes both the Illinois State University Annuitants Association (ISUAA) and the State Universities Annuitants Association (SUAA). Of the \$25 annual dues for retirees, \$21 is for SUAA dues and \$4 is for ISUAA dues. If you are currently retired or still employed by Illinois State University, please consider monthly automatic dues deduction. This saves time and money for SUAA and ISUAA; you will also be automatically enrolled for subsequent years unless you decide to withdraw your membership.

Only \$2.08 per month helps protect your benefits—become a member, or renew today!

A. Membership information *(please print)*

Name _____

Spouse's name _____

Address _____

City, State, Zip _____

Telephone _____

E-mail _____

Membership category

- | | |
|---|--|
| <input type="checkbox"/> Retiree (person receiving SURS annuity now) | <input type="checkbox"/> Pre-retiree (employed at Illinois State and vested in SURS) |
| <input type="checkbox"/> Survivor (spouse of deceased annuitant) | <input type="checkbox"/> Retiree not eligible for other categories |
| <input type="checkbox"/> Retiree and spouse | <input type="checkbox"/> Pre-retiree and spouse (pays only SUAA dues) |
| <input type="checkbox"/> Spouse (spouse of an annuitant or pre-retiree) | <input type="checkbox"/> Other (define) _____ |

B. Automatic dues deduction

(Current retirees only: \$2.08/month; \$3.83 with spouse)

Available only to current retirees receiving a SURS annuity.

I hereby authorize the State Universities Retirement System (SURS) to deduct each month the amount certified by SUAA as the current rate of dues. The deduction is to start as soon as possible and will continue until I inform SURS otherwise. I also authorize SURS to provide SUAA with any change of address.

Signature _____

Social Security number *(required)* _____

C. Payroll deduction

(Pre-retirees only: \$2.50/month; \$4.60 with spouse, August–May)

Available to current Illinois State employees only.

I hereby authorize Illinois State University to deduct each month, August–May, the amount certified by ISUAA as the current rate of dues. The deduction is to start as soon as possible and will continue until I submit a signed revocation form to Illinois State University.

Signature _____

Date _____ UID number (required) _____

Please consider the dues deduction option—it is very convenient!

D. Single cash payment

(\$25/year; \$46 with spouse, one calendar year)

Make check payable to SUAA.

Please return completed form and check, if applicable, to ISUAA, Campus Box 1300, Normal, IL 61790-1300.

OFFICE USE ONLY: _____ 086-724 (\$2.50) _____ 086-725 (\$4.60) 6/06

Reservation form—fall luncheon

Wednesday, September 5, 2007

11:30 a.m.

Old Main Room, Bone Student Center

Names of those attending: _____

Please reserve _____ meals at \$13 each. A check for \$_____ payable to ISUAA is enclosed.

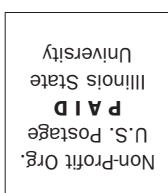
Entrees

_____ Roast beef _____ (name)

_____ Vegetable lasagna _____ (name)

Please send your reservation form by August 28, 2007, to Shirlee Bottomley, 507 East Taylor Street, Bloomington, IL 61701-5334, or Irene Niccum, 301 South Towanda Avenue #C, Normal, IL 61761-2110.

Please, no late or telephone reservations.



Amnuttants Association
Campus Box 1300
Normal, IL 61790-1300



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