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ISUAA—serving annuitants and survivors since 1971

President's message

By Christ Schwelle

February is here and it won't be long before baseball pitchers and catchers report to Arizona and Florida—a sure sign that spring is just around the corner. February 14 will cap Illinois State's 150th anniversary celebration. What a great slate of speakers and celebratory events. Thank you to all involved for making the 150th year a very special one for the entire community.

If you were among those who missed having programs at ISUAA luncheons, we've brought them back and hope you enjoyed the Madrigal singers at the holiday luncheon. The spring luncheon will feature entertainment by the School of Music.

This issue is full of information, including a request that those who pay their dues by check consider converting to automatic dues deduction. Please consider that.

Thank you to Tech Zone in the Bone Student Center for sponsoring this issue.

Convert to dues deduction and save ISUAA money

Thank you to those who utilize automatic dues deduction (dd) or ISU payroll deduction (pd) to pay their ISUAA/SUAA dues. We also appreciate those who pay by check and do so promptly. We appreciate all members, even those who are tardy in their renewals, but it has become increasingly obvious since these automatic deduction plans have been implemented that these methods of dues payments save us money as well as time.

While a number of members have converted, we still have less than half using this convenient form of payment. We would like to significantly increase that. We believe it is a plan worth investing in and thought about having a drawing with monetary prizes for those who convert but had second thoughts. Instead we thought we'd appeal to members to convert to help us save money/time, and for their own convenience. Let's face it; we all get a lot of mail and it is just too easy to toss it aside thinking we'll deal with it later.

Acknowledging that some annuitants are reluctant to put their full Social Security number on forms, the requirement for dd has been changed. Only the last 4 digits are required. Also, even if your single pay membership will not expire for months you can file a dd form now and conversion to dd will take effect when your single pay membership expires. Another new provision is that those still working for the University who are on payroll deduction can complete form #3 now and automatically convert to dd from their monthly SURS pension when they retire.

Should you have any questions about your current dues payment method or about the conversion process, please contact Paul Schertz at Schertz@mchsi.com or (309) 963-4610 or Christ Schwelle at cfschwel@ilstu.edu or (309) 663-0230.



TechZone

By Andy Schweizer, TechZone Director

TechZone, a department of Illinois State University, offers discounts and buying assistance to all members of the University community, including annuitants, on personal computers, software, peripherals, and supplies. They can help you purchase everything from complete computer systems to printer ink. TechZone offers the flexibility of shopping online from home or working with our friendly staff for personal assistance through the buying process.

TechZone is not a traditional computer store with rows of inventory. Most products are ordered online with our vendor partners. Vendors include: Apple, CDW-G, Crucial Technology, Dell, Lenovo/IBM, GovConnection and Insight Public Sector. There also are in-stock products available in the TechZone Showroom.

All vendors meet high standards for competitive pricing, quality products, customer service, warranty, and repair. To shop online, please visit www.techzone.ilstu.org. An active University Login ID (ULID) and password are required. Please e-mail techzone@ilstu.edu for more information or if you don't have an active ULID/Password.

Check out the new TechZone Showroom and Service Center now located across from the Barnes & Noble College Bookstore on the second floor of Bone Student Center.

TechZone offers a very popular service called the TechZone Setup and Configuration Service for only \$50. Let us configure your new computer and eliminate the hassles! This service is only available on computers purchased through TechZone.

Whether you're buying a new computer, software, or peripherals—come see us before you buy. www.techzone.ilstu.org

Illinois State Annuitants Association Newsletter

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

www.annuitants.ilstu.edu

ISUAA calendar

February 14, 2008

Founders Day-150th Anniversary Conclusion Convocation
Author, entrepreneur, inventor & futurist Ray Kurzweil

March 5, 2008 • 11:30 a.m.-1:30 p.m.

ISUAA Spring Luncheon*
Entertainment by the School of Music
Old Main Room

March 12, 2008 • 2-3:30 p.m.

ISUAA Board w/committee chairs
Spotlight Room

March 20, 2008 • 12:30-2 p.m.

ISUAA Survivor Planning*
Spotlight Room

April 3, 2008 • Noon-1 p.m.

"What SURS Participants Need to Know About Social Security"
Old Main Room

April 9, 2008 • 12:30-2 p.m.

ISUAA Survivor Planning*
Spotlight Room

April 24, 2008 • 12:30-2 p.m.

ISUAA Survivor Planning*
Spotlight Room

May 14, 2008 • 2-3:30 p.m.

ISUAA Board w/committee chairs
Spotlight Room

May 15, 2008 • 12:30-2 p.m.

ISUAA Survivor Planning*
Spotlight Room

May 20, 2008 • 11 a.m.-1 p.m.

Spring Advancement Retiree Luncheon*
Ewing Cultural Center

June 4, 2008 • 5:30-7:30 p.m.

ISUAA Annual Meeting/Dinner*
Brown Ballroom

July 9, 2008 • 2-3:30 p.m.

ISUAA Board w/committee chairs
Spotlight Room

**Indicates reservation required*

Spring dates to be determined:

March SUAA Board Meeting, June SUAA Annual Meeting

Advancement Lunch and Learn series

February 26, 2008 • 11:30 a.m.-1 p.m.

How to Enhance and Protect Your Retirement Nest Egg
Founders Suite

April 22, 2008 • 11:30 a.m.-1 p.m.

Retirement Planning 101
Founders Suite

June 12, 2008 • 11:30 a.m.-1 p.m.

The Pros and Cons of a Living Trust
Founders Suite

Conversion from single dues payment

1) To Automatic Dues Deduction (current retirees only; currently \$2.08/mo; \$3.83 w/spouse)

This is 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 upon expiration of my single payment membership and will continue until I inform SURS otherwise. I also authorize SURS to provide SUAA with any change of address.

Name/Date (print)

Signature and last 4 digits of Social Security number

OR

2) To Payroll Deduction (pre-retirees only; currently \$2.50/mo; \$4.60 w/spouse August-May)

This is available to current ISU employees only. I hereby authorize Illinois State University to deduct each month August through May the amount certified by ISUAA as the current rate of dues. The deduction will be implemented as soon as possible upon expiration of my single payment membership and will continue until I submit a signed revocation form to Illinois State University.

Name/Date (print)

Signature and UID# Required

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

3) From payroll deduction to automatic dues deduction

I am converting to ISU payroll deduction, or already on payroll deduction, and hereby agree that upon my retirement I wish to convert from ISU payroll deduction to automatic dues deduction (from my SURS monthly pension). I hereby authorize the State Universities Retirement System (SURS) to deduct each month the amount certified by SUAA as the current rate of dues. This conversion/deduction will take place/start as soon as possible after my retirement and will continue until I inform SURS otherwise. I also authorize SURS to provide SUAA with any change of address.

Name/Date (print)

Signature and last 4 digits of Social Security number

Please return completed form to ISUAA, Campus Box 1300, Normal, IL 61790-1300

Nominations sought for Alumni Association Awards

Nominations for the Illinois State University Alumni Association Awards can be accepted at any time throughout the year. The four awards presented each year are: the Distinguished Alumni Award, the Alumni Achievement Award, the E. Burton Mercier Alumni Service Award and the Outstanding Young Alumni Award.

Follow the Web link above to access on-line nomination forms. The Alumni Awards program occurs annually around Founder's Day. Please consider recognizing an individual who meets the criteria and has made an impact.

http://www.alumni.ilstu.edu/about_us/awards/index.shtml

In memoriam

Richard Albert	October 4, 2007
T. Melvin Holt	September 10, 2007
Margaret Jorgensen	January 1, 2007
Warren Quensel	September 4, 2007
Edith Williams	September 23, 2007
Gwendolyn Williams	September 23, 2007
Anna Woodworth	October 9, 2007

UA Lunch and Learn

University Advancement is offering three Lunch and Learn seminars in the coming months. These education sessions are designed to provide valuable information on establishing and managing personal resources as well as on understanding how your personal charities can be a part of this plan.

There is no charge to attend but space is limited. Advance reservation is required. Please contact Barbara Todd at (309) 438-2592 or bttodd@ilstu.edu for reservations or questions.

How to Enhance and Protect Your Retirement Nest Egg

*Tuesday, February 26, 2008 • 11:30 a.m.-1 p.m.
Founders Suite, Bone Student Center*

A comfortable retirement requires good management skills. Are you up to the task? Join us to learn about the financial risks of retirement, how to allocate retirement assets, why time in the market is more important than trying to time the market and how to increase current and future income for a comfortable retirement and for charities you wish to continue to support. The speaker is Bryan Crabtree, CFP.

Retirement Planning 101

*Tuesday, April 22, 2008 • 11:30 a.m.-1 p.m.
Founders Suite, Bone Student Center*

Do you want to retire soon or within the next five years? If so, join us for this seminar that explains how to plan ahead for retirement. You will learn what you need to consider before making a retirement decision as well as how much money you'll need to retire comfortably and continue to support philanthropic efforts important to you. You'll also learn how SURS fits into your financial planning. The speaker is Diane Ryon.

The Pros and Cons of a Living Trust

*Thursday, June 12, 2008 • 11:30 a.m.-1 p.m.
Founders Suite, Bone Student Center*

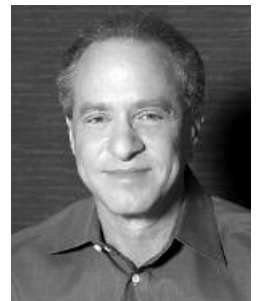
To trust or not to trust, that is the question. Join us and discover what you need to know to make an informed decision about whether or not to establish a revocable living trust, a vehicle to protect your assets and provide for your family and/or charities. We'll start with what a trust is and then look at the pros and cons of living trusts. The speaker is Cathy Pratt.



Founders Day

Illinois State University's year-long sesquicentennial celebration will conclude with activities on Founders Day, February 14, 2008. The convocation begins at 1 p.m. in Braden Auditorium, Bone Student Center.

In addition to the presentation of various faculty and staff awards, the convocation address will be given by Ray Kurzweil, widely regarded as one of the leading inventors of our time. Kurzweil was the principal developer of the first omnifont optical character recognition (OCR), along with the first print-to-speech reading machine for the blind, CCD flat-bed scanner, text-to-speech synthesizer, music synthesizer capable of recreating the grand piano and other orchestral instruments, and the first commercially marketed, large-vocabulary speech recognition system.



In addition, Kurzweil has written five books and hundreds of articles. In the year 2001, there were over 200 articles by or about Ray Kurzweil in leading publications, including most major national magazines. His first book, *The Age of Intelligent Machines*, was named Best Computer Science Book of 1990. Written in the late 1980s, it's been acclaimed for its remarkably accurate predictions about the 1990s and early 2000 years.

A public reception in the Brown Ballroom will follow convocation.

Other activities include the Founders Day Old Main Bell Ceremony, which begins at 10 a.m. in the Brown Ballroom. A public reception follows from 11 a.m. to 12:30 p.m. in the ballroom. Exhibits of various campus units and departments will be open throughout the day there.

Helping Hamper

By Janet Cook

The December holiday luncheon Helping Hamper collection was received with many thanks from the crew that unloaded the goods at the Clare House Soup Kitchen.

The Helping Hamper recipient for the March luncheon will be the Compassion Center, a daytime shelter for the homeless. They can use individual snacks including high protein bars, microwaveable single serving meals, coffee and tea, paper cups and napkins, cold medicine, facial & toilet tissue and laundry detergent.

Also, starting with the March luncheon we will start helping Thomas Metcalf School by collecting proofs of purchase called "Box Tops for Education." These are on standard household products and can be exchanged by Metcalf for cash or school supplies such as printers, digital cameras, cafeteria tables and a climbing wall for the gym. Among the brands are General Mills, Betty Crocker, Kleenex and Cottonelle. The rectangular "Box Tops" tokens are printed on the edge of the packaging where it won't distract the buyer from product information. These are smaller than a postage stamp in size. A collection jar will be placed at the name-tag station at each of our social events. Have your friends help you collect these and we can bundle up what we receive and help our campus school. If you cannot attend the events, and would still like to participate, please send them to Janet Cook, 17438 E. Walden Rd., Hudson, IL 61748.

Prairie Thunder hockey and other Alumni Relations events

If you've never experienced a hockey game or attended an event at the U.S. Cellular Coliseum, now is your chance. Saturday, February 23, has been declared ISU Night as the Bloomington Prairie Thunder take on Ft. Wayne. Even if you've had these experiences, you'll want to put this date on your calendar. For more information check the Alumni Relations Web site at www.IllinoisState.edu/alumni or call (309) 438-2586. You can also check the site or call for information on two events planned for June: the "Relatively Close" Chicago premier on June 6 and the Legacy of Leadership reception in Chicago June 20.

SURS participants and Social Security

ISUAA is pleased to announce a return of one of our most popular programs. On Thursday, April 3, 2008, from noon to 1 p.m., in the Old Main Room of Bone Student Center, Bill Carter, district manager for Social Security in Bloomington, will repeat his presentation on what SURS participants need to know about Social Security and Medicare. Bill presented this program in September. About 100 people attended and many suggested repeating this program for those who could not attend.

University Club

Jude Boyer

Gourmet dinners. The final gourmet dinner of the spring semester will be Saturday, February 23, in the Old Main Room, Bone Student Center. It will feature Australian cuisine. Full information about the menu and reservation details is available on the University Club Web site at www.lilt.ilstu.edu/uclub/gourmet_dinners.htm.

Discussion hours. The final discussion hour of the spring semester will be May 2. 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. Please join us for refreshments and lively conversation. Special discussion/information topics are noted on the University Club Web site at www.lilt.ilstu.edu/uclub/calendar.htm.

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

Further details about the University Club may be found on the Web at www.lilt.ilstu.edu/uclub.

Directory

By now you should have received your new ISUAA Chapter Directory. If you did not, and/or if you have any observations or comments, please contact Dona Meador at djmeado@ilstu.edu or (309) 452-7588. Also, as

your information changes, please let Dona know.

Check your directory and if there's an e-mail address listed that you do not use, please advise Dona. The directory printing/ mailing was tardy this year because of a "perfect storm" of events that included family health issues, computer problems and a very large number of changes (some 400 additions, deletions and information changes). Thanks to Dona Meador, Barb Perry and Jude Boyer for pitching in at various stages along the way to keep things moving along.



SUAA fall 2007 meeting summary

The SUAA Board of Directors met October 10, 2007, in Urbana. Representatives from throughout the state attended, including Janet Cook, Richard Dammers, Robert Hunt and Christ Schwelle from ISUAA.

SUAA finished 06-07 in the black financially, but is budgeted to experience a slight net operating loss in 07-08. There are sufficient reserves to cover the loss and hopefully, membership will increase significantly and help offset that. The SUAA membership committee, which includes Janet Cook, shared ideas for increasing membership.

The agenda also included approval of SUAA's legislative goals with a general focus on maintaining the integrity of the State Universities Retirement System (SURS) for present and future annuitants and survivors. The goals are:

- 1) Develop SUAA positions on budgetary reform and/or revenue enhancement proposals that might be considered in the forthcoming session of the General Assembly.
- 2) Maintain health benefits offered through the state employees group health plan and the college insurance plan.
- 3) Continue to monitor progress of current WEP/GPO repeal legislation. Issue Legislative Alerts, as appropriate.
- 4) Monitor the implementation of the GASB 45 accounting guidelines in the discussion of pension and health benefits issues in the General Assembly or by the governor or other members of the executive branch.
- 5) Support SURS legislation to restore the two-year sick leave credit option for those retiring under the years of service option for members in universities and community colleges, the increase of the death benefit from \$1,000 to \$5,000, and other SURS legislative proposals.
- 6) Develop a legislative call to action network of Chapter Legislative Chairs who will advise chapter members when to contact their representatives concerning pending legislation.
- 7) Continue to review developments regarding the convocation of an Illinois Constitutional Convention.

SUAAAction, SUAA's political involvement committee, reported that 12 chapters, including ISUAA, exceeded their fundraising goals. SUAAAction carries a balance of \$113,700 into 07-08. As of October 10, 2007, funds have been disbursed for SUAAAction representatives to attend fundraisers for eight legislators. It was noted that these fundraisers typically provide the opportunity for contact with more legislators than the one for whom the fundraiser is being held. ISUAA's Christ Schwelle is the SUAAAction treasurer.

Dick Lockhart was introduced as the new ISUAA lobbyist. Lockhart has extensive lobbying experience in Illinois and shared his philosophy and thoughts on lobbying. He discussed the likelihood of a Constitutional Convention. At this point he believes there are powerful interests that would oppose a Con Con, but continued negative perception of state government could influence voters to think constitutional change is needed.

Dan Slack, executive director of SURS, presented information on SURS, including a profile of participants and current financial information. This will hopefully appear in the SURS newsletter. Slack said legislators seemed to get the message that they could not fund pensions in an amount less than what was called for as this year's payment, but of course catch-up is also needed. Slack pointed out that '09 and '10 are crucial years in getting close to getting on track. Unfortunately the end of '08 is when the unfunded liability for retiree health costs, as well as pension liability, will be reported (GASB 45). That will be a major political issue at a time when a vote on convening a Con Con could be approaching—with an opportunity to open the door on the constitutional provision protecting pensions. We still believe, even in a worse-case scenario, the pensions of those already retired, and probably those already in the system, are protected, but we prefer to avoid going to court. We have an obligation to help public higher education stay competitive as it competes for future faculty and staff. Retiree health benefits do not have the same protection and we have no report on how those negotiations between AFSCME and the state are going. The consensus on the ride home was that SURS participants are fortunate to have Slack as executive director.

Information from the Illinois Retirement Initiative was shared with attendees. A number of state employee retiree organizations, including SUAA, are endorsing

Continued on next page

organizations and ISUAA Executive Director Linda Brookhart regularly attends the meetings. The Steering Committee includes the Center for Tax and Budget Accountability, AFSCME Council 31, IEA, IFT and Service Employee International Union Local 73. Points made included that the pension crisis in Illinois is not a fault of the pension systems, but of the state's failure to fund its obligations and switching from a defined benefit plan to defined payment is not the answer for a variety of reasons, including administrative costs of defined contribution plans.

Social Security offsets were addressed by Dr. Jeff Brown, UIUC finance professor and recognized authority on Social Security. Brown provided information on why

the offsets were enacted, the significant challenges in trying to repeal them and possible alternatives on pursuing modifying the formulas to lessen the adverse impact for those receiving both Social Security and public pensions. Brown noted that Illinois is one of only seven states that opted not to participate in Social Security. Brown's presentation was sobering relative to the likelihood of eliminating offsets, but gave hope relative to possible modification of the formulas. Informal discussions held subsequent to the fall meeting indicate that SUAA will likely continue to support repeal of the offsets.

This was an informative meeting and an important one for your representatives to attend.



Spring retiree luncheon at Ewing

Mark your calendars and plan to join your former University colleagues at a special spring retiree luncheon Tuesday, May 20, 2008, from 11 a.m. to 1 p.m. at Ewing Cultural Center. You will have the opportunity to learn about and tour the recently dedicated Genevieve Green Gardens.

The traditional spring retiree breakfast has been moved to later in the day to take advantage of the gardens. Lunch and a program



will be held under a tent on the grounds. Self-guided tours will follow. In the case of inclement weather, the event will be held at St. John's Lutheran Church on Emerson Street, across from Ewing Manor.

Read about the Genevieve Green Gardens at www.genevievegreengardens.ilstu.edu/. The 6-acre project is funded as part of a \$5.9 million bequest to the Illinois State University Foundation in honor of the late Genevieve Green and her profound love of flowers and nature.

Watch your mail this spring for your invitation, but feel free to contact Barbara Todd at btodd@ilstu.edu or (309) 438-2592 with questions.

Survivor planning

The ISUAA Survivor Advocacy Team has decided that because of the common questions they receive after the death of annuitants and the grief that surrounds such a loss, it would be a good idea to host educational sessions in advance for possible survivors. The focus will primarily be on SURS requirements and procedures. A checklist will be distributed and discussed. The format will be small group presentations and discussions led by Advocacy Team members.

The groups will be limited to 12 for each session and advance registration is required. Both the annuitant and the potential survivor should attend. The sessions will take place in the Spotlight Room of Bone Student Center (1st floor across from Circus Room), 12:30-2 p.m. on: Thursday, March 20, Thursday, April 24, Wednesday, April 9 and Thursday, May 15.

The same information will be covered at each session so you only need to attend one. For information, and/or to register, contact: Mary Liverman, mliverman@verizon.net or (309) 452-4181; or Edna Johnston, erjhons@verizon.net or (309) 452-5142.

T-BIRD Golf

By Pete Whitmer

Looking forward to summer and T-BIRD Golf? We will meet during the first two weeks in May. We will contact "incumbents" via e-mail as to the exact date and time. There also will be something in *The Report*. Incumbents should ask their fellow retirees if they would like to join us, and those who have not previously participated but would like to do so may contact me at pwhit8@webtv.net or 828-9550.

ISUAA spring luncheon reservation form

Wednesday, March 5, 2008

11:30 a.m.

Old Main Room, Bone Student Center

Entertainment by the School of Music

Names of those attending: _____

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

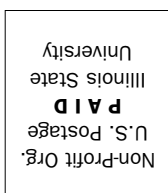
Entrees

_____ Chicken parmesan _____ (name)

_____ Vegetarian manicotti _____ (name)

*Please send your reservation form by February 25 to: Shirlee Bottomley, 507 E. Taylor Street, Bloomington, IL 61701-5334 or
Dona Meador, 311 S. Towanda Avenue No. 4, Normal, IL 61761-6101.*

Please, no late or telephone reservations.



Amnuitants Association
Campus Box 1300
Normal, IL 61790-1300



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