



www.suaa-ui.org

The Annuitant

A publication of the UIUC Chapter
State Universities Annuitants Association

Fall 2016

Pam Cler, Editor

SUAA-UIUC Fall Meeting Features Executive Director, State Universities Annuitants Association

Kathleen Holden

The 2016 fall meeting of the SUAA-UIUC Chapter will be held Sunday, October 9 at the I-Hotel and Conference Center in Champaign. The meeting will begin with social time at 1:30 p.m. with the formal meeting starting at 2:00 p.m.

SUAA statewide Executive Director Linda Brookhart will be the featured speaker. She will be bringing us information from her September meeting with CMS along with the latest legislative updates as we move towards the November election. In addition, she will remind us of the best ways to influence our legislators when there are issues that need to be addressed. This information is important for current and future retirees.



Not currently a member of SUAA-UIUC?

On page 10 you will find an excellent article originally published in the Spring 2016 issue of this newsletter. It contains President Hartman's remarks from the annual UIUC Retirement Planning Conference held in February 2016 in which she addressed the importance of SUAA and the benefits of membership.

Please consider joining!!

President's Report

Barbara Hartman

In August, I drove to Lincoln, Nebraska to attend the 25th annual conference of the Big Ten Retirees Association hosted by the University of Nebraska Emeriti Association. This was the second annual conference of this organization that I have attended. Last year it was held at Michigan State University in East Lansing. Attendance at these meetings affords the opportunity to learn about how other retiree associations are organized and how they serve their constituents. Since our chapter will serve as host for the meeting held in 2019, I was particularly anxious to learn how other groups planned for the meetings they hosted. I have requested information from the chairs of the planning committees at Michigan State, Nebraska, and Purdue. These materials will be helpful as we begin to plan for 2019.

To give you an idea of what goes on at these conferences, below is the list of speakers and topics presented this year:

Welcome from Chancellor Ronnie Green
Remarks by Marjorie Kostelnik, Interim Senior Vice
Chancellor
Remarks by Ron Yoder, Interim Vice Chancellor
Building Resistance to Stress and Aging by
Professor Emeritus Richard Dienstbier
Physical Exercise (Especially Aerobic) by Kimberly
Barrett, Assistant Director of Wellness
Services
Cognitive Enrichment/Mental Stimulation by
Associate Professor Julie Boron
"Mindfulness"/Meditation by Jane Williams,
Certified Yoga Instructor

(Continued on page 2)

EXECUTIVE COMMITTEE SUAA-UIUC CHAPTER 2016-17

~ OFFICERS ~

President

Barbara Hartman *

Vice President

Terry Ruprecht * - *Membership*

Secretary

Jane Loeb * - *Communications*

Treasurer

Ron Webbink *

~ OTHER EXECUTIVE COMMITTEE ~

William Adams * - *Legislative*

Pam Cler * - *Communications (Newsletter)*

Kathleen Holden * - *Program*

Terri Palumbo * - *Membership*

Robert Rich * - *Legislative/Webmaster*

Susan Trippiedi * - *Program/Arrangements*

H. F. (Bill) Williamson * - *Benefits*

Richard J. Winkel, Jr.* - *Legislative*

~ OTHER COMMITTEES ~

Mary Beastall - *Benefits*

Steve Rugg - *Legislative*

Helen Satterthwaite - *Legislative*

Rick Schoell - *Legislative*

~ LIAISONS ~

Athalia Hunt - *Campus*

Helen Satterthwaite - *Clark-Lindsey*

~ STATE SUAA LEADERSHIP ~

H. F. (Bill) Williamson* - *Foundation*

* *designates elected positions*

Table of Contents

SUAA-UIUC Fall Meeting.....	1
President's Report.....	1
SUAA-UIUC Spring Chapter Meeting.....	3
Benefits Report.....	3
SURS Now Issuing Electronic Check Stubs.....	6
<i>Inside Illinois</i> Now Out of Publication	6
Vehicle Registration Notices Update.....	6
CCFD Insert.....	Center Section
In Memoriam.....	7
2016-17 Chapter Legislative Position Statement.....	8
SUAA Membership Benefits.....	10
SUAA Membership Applications.....	11



(President's Message cont. From page 1)

On a tour of the UNL campus, stops included the Food Processing Center, the Greenhouse Innovation Center, and the University of Nebraska State Museum (a real jewel). Dinner on Saturday evening was held in the International Quilt Center, which has 4000 quilts from all over the world. Entertainment after dinner was by mezzo-soprano Patty Kramer (a doctoral candidate) and classically trained baritone Jesse Wohlman who recently sang the title role in *Don Giovanni*. Their performance was enchanting and a perfect way to end the evening.

Sunday's program was sharing by a representative of each retiree association about their organization's structure, programs, challenges, and successes. Most groups are for retirees only but three (including our chapter) include current employees.

Next year's conference will be held at Purdue. And planning is underway for the 2019 conference when Illinois will host.

SUAA-UIUC Spring Chapter Meeting, April 24, 2016

Barbara Hartman

The 2016 spring meeting of the SUAA-UIUC Chapter was held on Sunday afternoon, April 24. The featured speaker was U of I President Timothy Killeen. He offered observations and comments on his first year as President—one filled with fiscal and political challenges. He indicated that he appreciates the efforts of our organization. His presentation was well received by those in attendance.

In addition, four new candidates for the Executive Committee were elected. They are Bill Adams, Kathleen Holden, Sue Trippiedi, and Richard Winkel, Jr. Effective July 1, these four replaced the outgoing members who have completed the maximum of two three-year terms: Thomas Conry, Steve Rugg, Rick Schoell, and Ginny Waaler. They were thanked for their dedicated service.



Benefits Report

Mary Beastall and H. F. Williamson

Any report on annuitant benefits has to be a work in progress. Given the changing environment within which we live, new events may have occurred after this article was written that will affect our members. This is why the SUAA leaders monitor benefits-related activities in order to keep annuitants informed through the material provided on the Chapter and State SUAA websites. The SURS and CMS websites are also good resources. At the end of this report are boxes with all the contact information for SUAA, SURS and CMS.

Claim Payment Delay:

Funding availability for the Quality Care Health Plan is based on State revenue which fluctuates from month to month. Claim payments are released according to claim process date and available funding. This is a reminder that updated information regarding such delays appears on the CMS website under State Employee benefits. This includes the dates of payment for health providers and notes that

late payment will include an interest payment on claims that take longer than 30 days from the receipt of a complete claim submission to pay. Some annuitants find it helpful to give copies of this information to their health providers.

Benefits Choice Period:

There are now two Benefit Choice periods for annuitants dependent upon Medicare status of the annuitant and any dependent on the State health insurance plan. The fall period is for annuitants who are Medicare-eligible and whose dependents, if any, are also Medicare-eligible. CMS will mail information regarding this program in the fall, and this will include the date of eligibility for the Medicare plan (TRAIL). It is anticipated that CMS will move to an online enrollment. During Benefit Choice, an annuitant may choose to opt out of the State program. When opting out, an annuitant may lose other benefits, such as vision and prescription coverage. The Benefit Choice period for other annuitants is in the spring.

Flu Shots:

Free flu shots have been available in the fall at McKinley Health Center for members in the State insurance plan. Be sure to monitor the McKinley website (mckinley.illinois.edu) or the CMS website for updated information and dates.

Senior Services Guide:

The state SUAA website (<http://suaa.org>) now includes a Senior Services Guide that contains links to support services that may be helpful to members.

Did You Know?

The members of the Chapter Benefits Committee will continue to review and update the information on benefits available to retirees and other annuitants in issues of *The Annuitant* and on the Chapter website (<http://suaa-ui.org>). Most of these will be of interest wherever these individuals are living. Some benefits will be principally for those living in the Champaign-Urbana area. These include (a) benefits associated with I-Cards; (b) access to the Employee Assistance Program; (c) clinics in departments on the UIUC campus

(Continued on next page)

providing various services and (d) programs and facilities available to promote fitness and improved health.

Access through I-Cards. Retirees with I-Cards have access to many benefits on campus and in the community. If a retiree does not have an I-Card, that retiree should go to the Illini Union Bookstore ID Center on the first floor. Retiree status will be verified and an I-Card issued. In addition to benefits on campus, the I-Card serves as a free pass on any Champaign-Urbana Mass Transit District (MTD) bus.

Employee Assistance Program. The services of the Faculty Staff Assistance Program are available free of charge for employees, retirees and family members or significant others living in their households. Services include assessments, short-term counseling, crisis services, and referrals to appropriate resources. The offices are located at 1101 West Springfield, Urbana. (Phone 217-244-5312, website <http://fsap.illinois.edu>).

Audiology Clinic and Speech-Language Impairment Clinic. These are both in the Department of Speech and Hearing Science. The **Audiology Clinic** (217-333-2230) provides services to individuals of all ages who may be experiencing hearing difficulties, with such services including hearing assessment. The **Speech-Language Pathology Clinic** (217-333-2205) serves individuals of all ages who have communicative impairments. Further information is available on the departmental website <http://shs.illinois.edu>.

Financial Justice Clinics. This Clinic in the College of Law provides assistance to elders over 60 who have been victims of financial exploitation. There is no charge for the services of this clinic, although individuals with low income and few assets generally receive priority. Further information is available at <http://law.illinois.edu/academics/elder-financial-justice> or by telephone at 217-244-9494.

Fitness/Exercise Programs & Facilities

SilverSneakers Programs. All SilverSneakers Members have access to facilities and wellness programs throughout the country. For a listing of facilities and more information, visit the SilverSneakers website at: <https://www.silversneakers.com>.

The Lifetime Fitness Program. This program is sponsored by the Department of Kinesiology and Community Health and is designed for residents of the Champaign-Urbana area who are age 55 or older. Activities include group fitness, individual training and aquatics. Further information can be found at <http://lifetimefitnessprogram.kch.illinois.edu>. Members of OLLI receive a 20% discount on fees.

Campus Recreation. Retirees may continue (or start!) using Campus Recreation facilities such as CRCE and the ARC for an annual fee of \$480 which can be paid by having a monthly fee of \$40 deducted from their SURS annuity. Your spouse/partner can be added for an annual fee of \$276. More information about membership is available at the Campus Recreation website: <http://www.campusrec.illinois.edu/>.

Walking in UI Armory. Those who are interested in walking for fitness at the UI Armory may not be aware that seniors 55 and over may purchase a lifetime registration for \$25 rather than pay the \$3 daily. Visit the website at the following URL: http://fightingillini.com/sports/2015/3/24/uiarmory_info.aspx for further information.

Be sure to review contact information on the next page for CMS, SURS, and SUAA

STAY INFORMED!

Staying Informed About Your Benefits

Within SUAA, you can visit the state web site at www.suaa.org and the Chapter web site at www.suaa-ui.org. We recommend that you contact Central Management Systems (CMS) concerning questions about health care benefits and the State Universities Retirement System (SURS) about your annuity. The contact information for those offices and further information about what is available on the SURS web site is shown below.

Central Management Services (CMS)

Employees Benefits pages for State Employees:

URL: <http://www.illinois.gov/cms/Employees/benefits/StateEmployee/Pages/default.aspx>

Phone: 800-442-1300 or 217-524-4784

TTY: 866-277-5669

CMS uses your information on file with SURS.
Remember to keep your personal information up to date with SURS

State Universities Annuity Association (SUAA)

SUAA advocates for preserving retirement and healthcare benefits for participants in the State Universities Retirement System. Their advocacy is on behalf of retirees, current employees, and their dependents and survivors.

URL: www.suaa.org

Phone: 217-523-4040

Address: 217 East Monroe Street
Suite 100

Springfield, IL 62701

Email: suaa@suaa.org

State Universities Retirement System (SURS)

URL: <http://surs.com/>

Phone: 800-ASK-SURS (800-275-7877)
or 217.378-8800. Fax: 217.378-9800

Mailing Address: SURS, P.O. Box 2710,
Champaign, IL 61825-2710

Street Address: 1901 Fox Drive, Champaign, Illinois 61820

The SURS website provides access to a wide variety of topics and events of interest to its members. The “Life Events” link provides valuable information when there are significant life events. For example, steps are presented that survivors should take in the event of the death of a member.

By registering at the “Member Website Login” link at the top of the home page, a retiree can gain access to what is essentially a homepage. There you can find information about your annuity, your payment history, current payment information. You can also change your address, beneficiaries, phone number or email address. You may also make changes to your Federal Tax withholding status. For anyone without a computer, SURS has set up a kiosk computer station in their lobby for its members. The receptionist is available to assist in use of the kiosk.

SURS Now Issuing Electronic Check Stubs

(Submitted by Beth Spencer, SURS Communications Manager)

Electronic notifications will now be sent to SURS members who receive benefit payments through direct deposit and who have a valid email address on file when their payment has been issued.

The notice will direct members to log in to their secure Member Website to view their payment details.

The Member Website is available 24 hours a day and allows members to view and print check stubs, payment history and tax forms under the My Payment tab. Members may also update personal information, print forms, and access helpful resources.

Members who have not previously created a personal account through the SURS Member Website can do so at www.surs.org. Click on the gold Member Website Login button at the top of the homepage, then click on the Registration Process button at the bottom of the next page and follow the prompts.

Electronic payment notification is more secure, environmentally friendly and provides substantial cost savings.

Members not receiving payment through direct deposit and who do not have a valid email address on file will receive paper notifications if their benefit amount decreases.



Inside Illinois Now Out of Publication

Pam Cler

As of May 5, 2016 *Inside Illinois* is no longer being published. The newspaper existed in a print format until last September, when it transitioned to a digital only format. The digital format was accompanied by a weekly email informing subscribers of the latest news.

However, the Office of Public Affairs has since concluded they can better serve the campus by incorporating all its work into the News Bureau website and focus on its core function of sharing research excellence of the university with media across the nation and around the world.

You may still direct your browser to the News Bureau website (<https://news.illinois.edu/blog/view/367>) as the bureau will continue to carry campus news and announcements, research news, faculty interviews, death notices and the “Behind the Scenes” blog.



Secretary of State to Resume Mailing Vehicle Registration Notices

Pam Cler

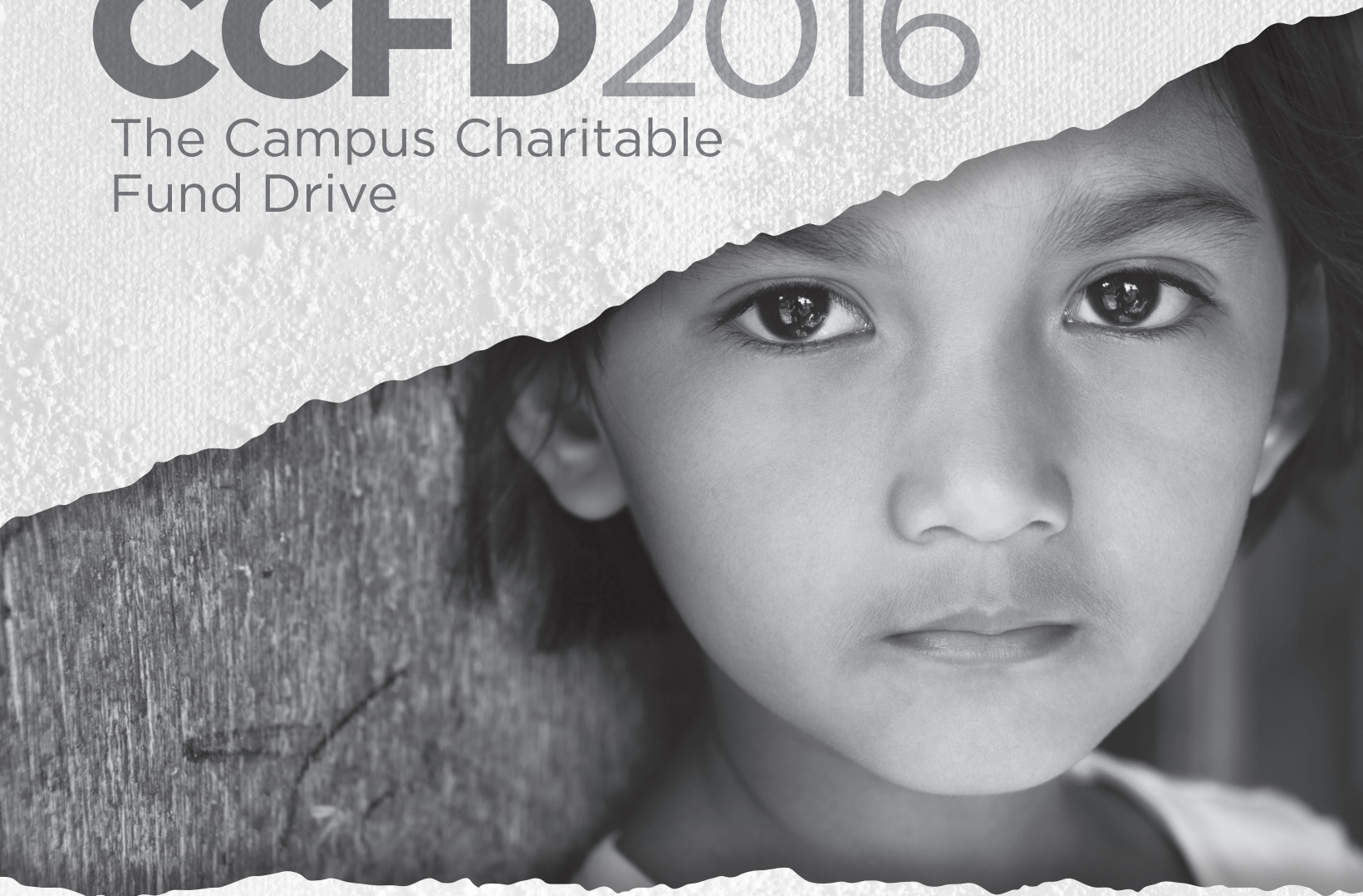
As of early August, the Illinois Secretary of State’s office has resumed mailing vehicle registration reminders. The stop-gap budget that was passed over the summer has allowed the office to resume mailing the notices.

Secretary of State White still urges motorists to sign up for email registration reminders to continue to save on postage costs. You will need the Registration ID and the PIN from your vehicle registration card. If you do not have a registration card, call the Public Inquiry Division at 800-252-8980 to obtain your Registration ID and PIN number. Then sign up at: <http://www.ilsos.gov/greenmail/>.

S E P T E M B E R 1 9 - N O V E M B E R 1 1

CCFD2016

The Campus Charitable
Fund Drive



R E T I R E E B O O K L E T



ccfd.illinois.edu

September 1, 2016

Dear University of Illinois Retiree,


Thank you for your continued support of the **Campus Charitable Fund Drive**. Last year, our campaign generated more than \$1.34 million from retirees and employees to support local area and national social service, advocacy, and community organizations.

The 2016 CCFD Campaign will kick off on Monday, September 19, 2016 and conclude on Friday, November 11, 2016. This critical campaign benefits the surrounding community in immeasurable ways. The nonprofit organizations to which you can contribute through the CCFD are dedicated to improving lives locally and nationally. From Special Olympics of Illinois and United Way of Champaign County to the American Cancer Society and the United Negro College Fund, the amazing and hard-working people of these organizations make sure that your money helps those who need it most. Please remember that 100% of your donation through the CCFD will go directly to the charity or charities you select. Your contributions make real differences in our community.

Take a moment to select the charity that inspires you, complete the CCFD Pledge Form and send it in along with your check or money order. Contributions are tax deductible. You may also make your pledge on the CCFD website: **ccfd.illinois.edu**

We thank you for your past generosity and appreciate your contributions to the 2016 CCFD Campaign. Give us a call at 265-6398, if you have questions or visit the CCFD website at ccfd@illinois.edu

Warmest Regards,

A handwritten signature in cursive script that reads "Julie Gunn".

Julie Gunn, Associate Professor, School of Music
Chair, 2016 Campus Charitable Fund Drive

2016 Campus Charitable Fund Drive

Retiree Pledge Form - (please print)

Name (First and Last)		Email	
Phone	UIN (if available)	Retirement Year	
Address	City	State	ZIP
University of Illinois Department/Unit to whom you wish this contribution to be credited. You may select the department from which you retired or a department of your choice.	Release information <input type="checkbox"/> I DO NOT wish to be contacted by the Agency <input type="checkbox"/> I DO wish to receive acknowledgement from the Agency for my contribution		
Select from the 12 Umbrella Agencies: American Cancer Society American Heart Association America's Charities Black United Fund Community Health Charities of Illinois Community Shares of Illinois EarthShare Global Impact Independent Charities of America Special Olympics Illinois United Negro College Fund United Way of Champaign County			
Many of the 12 Umbrella Agencies allow you to select specific DESIGNATIONS and you may contribute to one or more designations. Complete the form with the name of the Umbrella Agency and then specify the designation and the amount to each designation.			
Umbrella Agency Name			
Designation		Amount	\$
Designation		Amount	\$
Designation		Amount	\$
Designation		Amount	\$
	Total amount for this Umbrella Agency and associated designations		\$
Umbrella Agency Name			
Designation		Amount	\$
Designation		Amount	\$
	Total amount for this Umbrella Agency and associated designations		\$
Send Pledge Form to: Campus Charitable Fund Drive 330 Illini Union Bookstore Building, MC 319 807 South Wright Street, Champaign, IL 61820			

Participating Agencies



American Cancer Society

When you support the American Cancer Society, you are joining a worldwide movement to help people stay well, help people get well, find cures, and fight back against cancer. (800) ACS-2345
www.cancer.org | 27.9%

American Heart Association

The American Heart Association is the nation's oldest, largest voluntary organization devoted to fighting cardiovascular diseases and stroke. (217) 698-3838
www.heart.org | 20.9%

America's Charities

Working to build strong communities. Addressing needs of children, families, communities through member programs by helping employers and employees support our member charities' programs. (800) 458-9505
www.charities.org | 4.3%

Black United Fund of Illinois

A self-help organization that provides financial and technical support to projects that improve the quality of life in African-American communities throughout Illinois. (773) 324-0494
www.bufi.org | 4.4%

Community Health Charities of Illinois

Partnering with Illinois' most trusted health Charities to deliver community-focused volunteer activities and credible health information and efficient charitable giving to employees in the workplace. (312) 332-0198
www.illinois.healthcharities.org | 14.5%

Community Shares of Illinois

Community Shares of Illinois represents a diverse group of charities with a common mission - to make our world a better place. (217) 352-6533
www.communitysharesillinois.org | 9.9%

EarthShare Illinois

An alliance of leading nonprofit environmental and conservation charities, working across Illinois and the nation to protect human health and the environment. (312) 795-3740
www.earthshare-illinois.org | 12.9%

Global Impact

Supports respected and effective international charities to address critical humanitarian issues throughout the world, such as disaster response, human trafficking, education, malaria, water and hunger. (800) 836-4620
www.charity.org | 10.39%

Independent Charities of America

Feeding the hungry. Sheltering the homeless. Protecting the children. And healing the sick. America's finest independent charities. Working with you to share - the American way. (800) 477-0733
www.independentcharities.org | 1.1%

Special Olympics Illinois

Part of an international program, Special Olympics Illinois provides year-round sports training, competition and a variety of skill-building opportunities for children and adults with intellectual disabilities. (309) 888-2551
www.soill.org | 20.4%

United Negro College Fund

America needs more college graduates. President Barack Obama has committed the country to regaining world leadership in the percentage of people with a college education. (312) 845-2200
www.uncf.org | 10%

United Way of Champaign County

Working with a diverse group of community partners, we aim to bring people and resources together to create positive change and lasting impact in our community. (217) 352-5151
www.uwayhelps.org | 13.8%

Just For Retirees

Frequently Asked Questions about the Campus Charitable Fund Drive

University of Illinois at Urbana-Champaign

Q. What are the dates of the 2016 CCFD Campaign?

- A. The 2016 CCFD Campaign runs from September 19 – November 11, 2016. We will accept contributions from retirees for the 2016 CCFD Campaign up until the end of the year.

Q. How do I donate?

- A. Complete the Pledge Form and return it with your check or money order. You may also make your pledge online at ccfd.illinois.edu. If your UIN is available, please have that number when you make an online contribution.

Q. What non-profits can I donate to?

- A. You may donate to one of the twelve CCFD Agencies directly. You may also donate to an of the designated non-profits listed under each agency. The complete list of CCFD Agencies and their designations can be found at www.ccf.illinois.edu/agencies

Q. Does my gift count towards the goal for the University Department/Unit from which I retired?

- A. You may select which department/unit gets credit for you donation. The Retiree Pledge Form has a box to complete regarding whom you would like to receive credit for your contribution.

Q. How is Release of Information handled?

- A. You may specify how or if you wish to be contacted. On the Pledge Form,

Select one of two boxes:

- ☐ I DO NOT wish to be contacted by the Agency
- ☐ I DO wish to receive acknowledgement from the Agency for my contribution

Q. I have given directly to the United Way in the past and plan to continue to do that this year. Can I receive CCFD credit for my direct contribution to United Way?

- A. If your contribution to United Way occurs during the 2016 CCFD Campaign, it may be counted. CCFD works closely with the United Way of Champaign County to ensure both campaigns give the donor credit for your generous contribution. When giving to United Way, let them know you are a University of Illinois retiree and would like to receive CCFD credit for your donation. If you give to United Way through the 2016 CCFD Campaign, United Way will be informed of your gift.

Q. Where do I mail or drop off my 2016 CCFD Pledge Form?

- A. 2016 Campus Charitable Fund Drive
330 Illini Union Bookstore
807 South Wright Street
Champaign, IL 61820

Q. What if I need more information or have questions?

- A. Visit ccfd.illinois.edu, send us an email at ccfd.illinois.edu or call us at 217-265-6398

Donate now!

CCFD is an annual campaign and right now is the best time to help us
help someone less fortunate.

You can give on-line and make your pledge.

CCFD comes around just once a year, so don't put off until tomorrow
what you can contribute today.



ccfd.illinois.edu

IN MEMORIAM

Terri Palumbo

As a service to readers, *The Annuitant* publishes a listing of deceased employees and annuitants taken from *Inside Illinois* issues as well as other print sources. The following listing gives the name, the date of death, and the age at death (when known) for those individuals whose death notices appear between January 30, 2016 and July 21, 2016.

Due to increased privacy restrictions and the lack of public information in many obituary notices, this list can be difficult to develop. Thus the list may gradually become less comprehensive.

Adleman, Marilyn E., 81, 2/12/16	Holt, Sharon, 74, 6/30/16
Alsip, Vivian Ilene (Ohl), 94, 5/21/16	Ignazito, Martin Donald, 77, 2/3/16
Anderson, William Leno, 80, 3/6/16	Jenkins, Frederic Magill, 86, 3/10/16
Andresen, John W., 90, 12/10/15	Johnson, Frances M., 83, 3/13/16
Applequist, Douglas Einar, 85, 1/30/16	Kaufman, Jerome B., 6/24/16
Armbruster, Bonnie B., 67, 3/1/2016	Kennedy, Daniel Bowers, 69, 2/11/16
Baer, Werner, 84, 3/31/16	Kindhart, Jeff D., 51, 2/8/16
Bendel, Andrew, 68, 3/29/16	Lehman, Frederic Kris, 92, 2/10/16
Bergeron, Clifton G., 91, 4/14/16	Martin, Wayne, 80, 6/30/16
Brighton, Gerald, 95, 2/13/16	Mast, Plessa Edward, 89, 2/19/16
Buford, Sally Kemp Dawson, 77, 3/31/16	Maxwell, William Hall Christie, 80, 4/18/16
Burris, Kimbra Lisa, 56, 4/13/16	McNeely, Nolan, 99, 5/2/16
Burtress, Kathryn Avery Cobb, 90, 4/21/16	Menacher, Donna Mae, 86, 4/2/16
Carbonneau, Beth E. Morrison, 76, 2/3/16	Milroy, Louise Van Buskirk, 91, 6/6/16
Chamberlain, Artha L., 97, 2/18/16	Mitchell, Joan L., 68, 12/2/16
Coad, Carl S., 90, 4/20/16	Mullen, Jean Colee "Jeanie", 89, 6/25/16
Crawford, Frances Jo Freeman, 82, 2/19/16	Nelson, Betty Ann, 80, 4/26/16
Daley, Annie (Anne) Council, 87, 6/17/16	Nelson, Burr, 66, 4/16/16
Dawn, C. Ernest, 97, 1/5/16	Oliver, Theo "Bow", 91, 2/8/16
Dollins, Paul Wayne, 81, 3/30/16	Opperman, David Russell, 91, 7/5/16
Ebeling, Donald Eugene, 84, 7/8/16	Parker, Paul Everett, 80, 7/2/16
Ebert, Mary Matilda (Brownfield), 80, 6/12/16	Pearson, Mary Alyce (Carpenter), 74, 3/21/16
Ehmen, Albert, 96, 1/31/16	Phillips, Clarence Lee "Pete", 89, 4/8/16
Elliott, Thomas S., 52, 3/13/16	Porter, JoAnne, 69, 4/9/16
Eveland, Melbourne David "Pete", 72, 4/20/16	Risken, Jared Cleveland, 68, 1/25/16
Exum, Jerry D. "Squirrel", 63, 3/27/16	Rodgers, Frederick A., 77, 2/16/16
Frederick, Gaylord, 87, 3/5/16	Shorish, M. Mobin, 81, 4/12/16
Fuoss, Gerald L., 76, 4/8/16	Shumard, John R., 64, 3/11/16
Gaines, William, 82, 7/20/16	Slack, Daniel Keith, 73, 4/8/16
Gauchman, Hillel V., 78, 3/18/16	Sommer, Roger A., 85, 4/27/16
Gillespie, Junetta Blythe, 85, 5/28/16	Sprague, Robert L., 85, 3/23/16
Glasper, Kathryn Jean, 75, 6/21/16	Stewart, Bryan D., 85, 5/21/16
Golladay, Betty June (Brooks) Smith, 94, 3/31/16	Sullivan, Jeremiah David, 77, 7/7/16
Gorecka, Danuta Maria, 93, 3/29/16	Terry, Jane, 69, 4/21/16
Gottheil, Fred Monroe, 84, 4/17/16	Thrasher, Pauline Elizabeth, 93, 4/30/16
Harnisch, Delwyn (Del) Lynn, 66, 5/18/16	Trees, Audrey Louise (Handley), 87, 4/20/16
Harsacky, Margaret Ann, 93, 2/14/16	Ujhelyi, Zoltan, 85, 2/13/16
Hawn, Bill, 72, 3/30/16	Verdeyan, Joseph T., 83, 2/16/16
Henry, Margaret R., 91, 4/11/16	Wetenkamp, Harry R., 97, 6/13/16
Hodgkins, Audrey, 87, 7/18/16	Young, Andrew "Tippy" Jr., III, 59, 3/19/16
	Zuidema, "Tom" Reiner, 88, 3/2/16

2016-17 SUAA-UIUC Legislative Principles, Goals and Facts

Robert Rich, Steve Rugg, Helen Satterthwaite, Rick Schoell, Richard Winkel

Introduction

Even the longest-lived observers of state government operations in Illinois find it difficult to assess the full impact of the political grid-lock that has enveloped interactions between the Illinois General Assembly and the Governor. "Budget impasse" or "budget stalemate" are terms often used to describe what has occurred (or, more accurately, not occurred) to this point. But neither phrase adequately describes the extent of damage inflicted by the inability of legislators and Governor to agree on which essential programs should be funded at what levels and from which sources.

The implication of using either phrase is that once the impasse is broken or stalemate averted, all will be well. Indeed, when the so-called "stop-gap" budget was approved for a portion of the current fiscal year, the overwhelming reaction reflected in media reports was one of relief and almost a return to normalcy. But that is far from accurate. There are serious, negative, long-term implications to the hostile environment that surrounds the budget-making process for the state. Those implications focus on the most basic and fundamental factor underpinning the successful operation of state-funded programs: trust. Even with a full-year budget in hand, issues of trust will remain between the Governor and General Assembly, and between those who depend on state appropriations to run programs effectively and efficiently. Until a reasonable level of trust can be reestablished and a multi-year period of reasonable fiscal stability achieved, there will be cause for strong concern for the quality and effectiveness of state-supported programs. Recent reports of increased faculty departures from the University of Illinois and increased difficulty in attracting talented replacements for them are but one example of the impact of this concern over trust.

Legislative Principles

In this context the following set of legislative principles have been articulated for SUAA-UIUC. Together they represent the SUAA-UIUC legislative position statement for 2016-2017, and the principles on which our legislative actions are based. Along with the statewide SUAA office we will monitor legislation closely and continue to work hard on your behalf to ensure your well-earned benefits are protected. These are our principles:

- Achieving fiscal stability as soon as possible is the most critical step for Illinois state government. Our state continues to face enormous structural deficit and budget problems. No effective long-term planning or progress is possible without stability.
- No single mechanism is sufficient to achieve fiscal stability. A combination of budget cuts, budget reform and new revenue measures is required.
- Higher Education is critically important to economic growth for Illinois, both in terms of delivering a technologically sophisticated work force and in generating new business growth via commercialization of university-based research and development.
- Competitive benefit programs are essential to attract and retain faculty and support staff to sustain higher education's role in economic development.
- University leaders and retirees must work together to address benefit and state budget issues.

(Continued on next page)

-
- Current retirement programs for higher education and other public employees in Illinois are not overly generous. Indeed, most institutions with which the University of Illinois competes for talented faculty and staff invest substantially more in retirement programs for their employees. Virtually all such programs combine Social Security and supplemental institutional benefits.

SUAA's Legislative Successes

Several lawsuits have been resolved recently which protected benefits to our annuitants by reaffirming that the retirement provisions enacted in PA 98-599 violated the non-impairment clause of the state constitution as well as ensuring the provision of health care benefits to annuitants. SUAA established a legal fund to retain counsel to represent SUAA members in these court cases and is prepared to retain counsel in the future if needed

Illinois' fall 2012 election ballot included a Constitutional Amendment proposed by the General Assembly that would have changed benefit processes. The language of the proposed Amendment was confusing and its purposes obscure and unclear. A leading expert on the Illinois Constitution characterized the proposal as "catastrophic". SUAA established a ballot initiative group, separate from SUAA, and successfully worked to defeat the Amendment.

Given the state's current deficit and worst-in-the-nation pension funding (attributable to the state's failure to pay the employer's share for the program) it is certain that new pension reform legislation and possibly constitutional amendments will be forthcoming.

Accordingly, we must remain vigilant and active to ensure our benefits are protected and remain whole. Employees have paid every penny required of them, and SURS investment earnings have exceeded benchmarks.

State SUAA Legislative Position Statement

The SUAA Board of Directors has endorsed a legislative position statement for the statewide organization. It identifies new efforts that SUAA can support as well as those which the organization will continue to oppose strongly. The statement can be viewed at the SUAA web site: www.suaa.org.

Some Basic SURS Data

- At the end of 2013, the State Universities Retirement System (SURS) covered a total of 81,302 active employees in public colleges and universities. Of that number 70,515 were enrolled in a defined benefit plan and 10,746 in the "self-managed" option.
- For 2013, 48,142 retirees under the SURS defined benefit program received a monthly annuity averaging \$3,054 or approximately \$36,650 per year.
- That average annuity was based on a final average salary figure of \$52,500 and an average of 19.11 years of eligible service credit.
- While considerable media attention is devoted to the "top 100" state pensions, they represent only 2/10s of one percent (0.2%) of all SURS pension recipients. The vast majority of SURS retirees earn modest annuities.
- In the mid-1990s legislation was enacted mandating improved funding for all of Illinois' public retirement systems, with a goal of achieving a funding ratio of 90% of assets to liabilities. By FY2000, the funding ratio had reached 88% before declining to 66% in FY2004, where it held steady through FY2007.
- Although every individual SURS participant paid every penny he/she was required to pay in every year, significant reductions in the amount of state support appropriated for SURS and substantial reductions in interest earnings during the Great Recession had combined to drop the funding ratio to 43.7% by FY2013.

SUAA Membership Benefits

(President Hartman's Remarks at the February 2016 UIUC Retirement Planning Conference)
(this is a reprint from the Spring 2016 newsletter)

We do live in interesting times—still no FY16 budget for Illinois. And a most fascinating Presidential campaign!

The past few years, UIUC has offered a retirement planning conference. Each year our chapter has been invited to make a presentation at the conference and to have a table where attendees can pick up information about our organization. Here is the bulk of the brief presentation I made this year:

~~~~~  
*I would like to begin by saying "Congratulations!" It is exciting to be approaching retirement with all the opportunities, adventures, and new experiences it affords. And also congratulations on your decision to attend this seminar. There are many decisions to be made as you contemplate retirement, and you are wise to take advantage of an opportunity to garner information.*

*I applaud the University for offering these seminars. It shows their dedication to and appreciation of its human resources.*

*So, I am here to tell you about the State Universities Annuity Association. Currently I serve as President of the University of Illinois at Urbana-Champaign chapter. We tend to refer to the organization as SUAA or "soo ah."*

*First, and most important—SUAA is the only organization that advocates for preserving retirement and healthcare benefits for participants in the State Universities Retirement System (SURS). This includes retirees, current employees, and their dependents and survivors.*

*Here's what our organization has been doing since its founding in 1971:*

- *continuously tracks pension and healthcare benefit issues, state funding, and other related concerns*
- *assures that legislators, executive officers, and other policymakers are knowledgeable about pension and benefits issues*
- *lobbies the state legislature to prevent legislation that would harm members and to support legislation that will make pension and healthcare benefits stronger*
- *provides regular updates to members on topics of interest to all SURS participants.*

*Some important accomplishments:*

- *sued the State regarding the pension reform law which was ruled unconstitutional by the Illinois Supreme Court*
- *prevented a bill from becoming law that could have abolished tuition waivers for university employees*
- *challenged and won the "Kanerva" case which stopped the State from its attempts to deny health care benefits to retirees*

*Membership in SUAA shows elected officials we are united and serious about protecting our benefits. SUAA ensures you have access to the benefits and services you've earned. It helps you to stay up-to-date with the latest and most accurate information.*

*In addition to email briefings on important topics, the UIUC chapter holds two membership meetings each year—one in the spring and one in the fall. All members are invited to attend. We invite a speaker to come to each meeting. For our fall 2015 meeting, Bryan Lewis, Executive Director of SURS, spoke. This April, U of I President Timothy Killeen will speak. We also publish a newsletter twice a year that is sent to all members.*

*In closing, I encourage you to seriously consider joining SUAA. There is a membership application in your folder. Note that you can pay the annual membership fee either by check or by payroll deduction. Payroll deduction is a wonderful option as the fee is spread out over a year with a small portion being taken from each paycheck. Once you retire, you can continue your membership by having the fee deducted from your annuity check.*

*If you decide to join today, you can complete and sign the form and give it to a volunteer at the SUAA table. We will send to the state office any forms you give us. We will be available until 1:00 p.m. If you complete it later, simply send it to the address indicated on the form.*

*The invitation to complete the application and leave it at the SUAA table garnered 15 new members! And I am sure that there will be other new members who send in their applications later. This event is definitely a worthwhile partnership with the University.*



***To join SUAA, a membership application can be found on the facing page. ➔***





State Universities  
Annuitants Association

**Please Mail Signed Form To:**  
217 East Monroe, Suite 100  
Springfield, IL 62701  
217-523-4040

## SUAA Membership Application

University of Illinois

Urbana-Champaign Chapter

RETIREES ONLY

### Select Payment Option:

1. Automatic Dues Deduction (SURS)
2. Annual Payment (Check or Money Order)

Membership Type: \_\_\_\_\_ Year Retired

Retiree  
Retiree and Spouse/Partner  
Spouse/Partner  
Surviving Spouse/Partner  
Supporter

Name: \_\_\_\_\_

Spouse/Partner: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_ Phone: \_\_\_\_\_

Email: \_\_\_\_\_

### Chapter Dues Amount:

\$ 3.42 member monthly deduction  
\$ 6.83 member & spouse monthly deduction  
\$ 41.00 single member annual payment  
\$ 82.00 member & spouse annual payment  
\$ \_\_\_\_\_ SUAA Foundation - Requires separate check  
\$ \_\_\_\_\_ SUAA Legal Fund – Requires separate check  
\$ \_\_\_\_\_ SUAAAction – Requires separate check

### Signature Required for SURS Dues Deduction:

I hereby authorize the State Universities Retirement System (SURS) to deduct monthly the amount as certified by the UIUC Chapter as the current rate of dues. The deduction will start once the SURS process is complete and will continue until termination is requested in writing.

Signature: \_\_\_\_\_



State Universities  
Annuitants Association

**Please Mail Signed Form To:**  
217 East Monroe, Suite 100  
Springfield, IL 62701  
217-523-4040

## SUAA Membership Application

University of Illinois

Urbana-Champaign Chapter

EMPLOYEES ONLY

### Select Action to Take:

1. Activate Payroll Deduction
2. Terminate Payroll Deduction

### Select Employee Pay Schedule:

1. Monthly
2. Bi-weekly

### Membership Type:

\_\_\_\_\_ Active Employee

Employee UIN: \_\_\_\_\_

Name: \_\_\_\_\_

Spouse: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### Chapter Dues Amount:

\$ 3.42 employee's monthly deduction  
(annual deduction total of \$41.00)  
\$ 1.71 employee's bi-weekly deduction  
(annual deduction total of \$41.00)

### Signature Required for Payroll Deduction:

I hereby authorize the **University of Illinois** to deduct, each month, the amount as certified by SUAA as the current rate of dues. The initial deduction will begin within 30 days of receipt of this dues deduction authorization by the University of Illinois. The dues deduction will continue until termination is requested in writing.

Signature: \_\_\_\_\_



State Universities  
Annuitants Association

**Please Mail Signed Form To:**  
217 East Monroe, Suite 100  
Springfield, IL 62701  
217-523-4040

## SUAA Membership Application

University of Illinois

Urbana-Champaign Chapter

### CURRENT EMPLOYEES ONLY

### ANNUAL CHECK/MONEY ORDER PAYMENT

### Membership Type:

\_\_\_\_\_ Active Employee (including allied agencies)  
\_\_\_\_\_ Active Employee and Spouse/Partner

\_\_\_\_\_ Spouse/Partner

\_\_\_\_\_ Supporter

Name: \_\_\_\_\_

Spouse/Partner: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Telephone: \_\_\_\_\_

Email: \_\_\_\_\_

### Chapter Dues Amount:

\$ 41.00 member payment (check/money order)  
\$ 82.00 member & spouse payment  
\$ \_\_\_\_\_ SUAA Foundation - Requires separate check  
\$ \_\_\_\_\_ SUAA Legal Fund – Requires separate check  
\$ \_\_\_\_\_ SUAAAction – Requires separate check

---

**University of Illinois at Urbana-Champaign  
SUAA-UIUC Chapter  
364 Henry Administration Building, MC-346  
506 S. Wright Street  
Champaign, IL 61801-3689**

Non-Profit Org.  
US Postage  
**PAID**  
Permit No. 75  
Champaign, IL