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*ISUAA—serving annuitants and survivors since 1971*

### **President's comments**

Thanks to Tech Zone in Bone Student Center for sponsoring this winter 2009 issue of the ISUAA newsletter. Such sponsorships help keep our dues low. The fall 2008 issue had the banner from summer 2008. I apparently missed that while proofing.

I was pleased to hear that over 140 people attended the Holiday Luncheon. I'm sorry I missed it. Thank you to Richard Dammers for hosting the event and arranging for the performance by the Madrigal Singers.

It was also good to hear about the volume of donations collected for the Clare House Soup Kitchen.

Thank you to Parker Lawlis for arranging and hosting a coffee featuring Senator Bill Brady and Representatives Dan Brady and Keith Sommer discussing "State Finances: What's Going on in 2009." The program took place December 11 at the Alumni Center. The event was finalized too late to meet the deadlines of ISUAA's fall newsletter or the ISU Report, so e-mail was used to spread the word and more than fifty people attended. It is difficult to see how the state can meet its financial obligations without revenue enhancement.

*Christ Schwelle*

### **Social Security program popular again**

On October 23, 2008, Bill Carter, director of the Bloomington Social Security Office, presented his program "What SURS Members Need to Know about Social Security/Medicare." More than eighty people attended, primarily current employees. Close to 300 have attended the last three sessions presented by Carter. This program was co-sponsored by ISUAA and Illinois State University Human Resources with assistance from University Advancement. The purpose is to fully inform those who might be eligible for Social Security benefits as well as a SURS pension of the various policies that could impact them so they can plan accordingly. Specific topics included a review of the Social Security brochure on retirement benefits and documents about when to start receiving retirement benefits, the Windfall Elimination Provision, government pension offsets, and Medicare eligibility. ISUAA hopes to schedule another session in the spring. Information on these topics is available on the Social Security Web site [www.socialsecurity.gov](http://www.socialsecurity.gov).

## TechZone

by *Andy Schweitzer, TechZone director*

TechZone, a department of Illinois State University, offers discounts and buying assistance to all members of the University community with computers, software, and supplies. They can help you purchase everything from personal computer systems to extra printer ink. TechZone offers the flexibility of shopping online and a showroom where you can work with friendly staff for personal assistance through the buying process.

TechZone is not a traditional computer store with rows and rows of inventory. Most products are custom configured and ordered online through vendor partners that meet high standards for competitive pricing, quality products, and customer service. Primary computer vendors include Apple, Dell, and IBM/Lenovo with other companies such as CDW-G, Crucial Technology, and GovConnection having great prices on memory and peripherals. TechZone also carries a few in-stock products such as iPods and cables. More frequently, TechZone has select computer systems in-stock.

To shop online, please visit [www.TechZone.ilstu.org](http://www.TechZone.ilstu.org). An active University Login ID (ULID) and password are required. E-mail [techzone@ilstu.edu](mailto:techzone@ilstu.edu) or call (309) 438-8334 for more information or if you don't have an active ULID/Password. You are always welcome to visit their showroom located on the 2nd floor of the Bone Student Center across from the Barnes and Noble College Bookstore.

The TechZone Service Center has a walk-up counter and is available for basic tech questions and can perform hardware warranty repairs on-site. They also offer a very popular service that makes your newly purchased computer ready to go. Let us set up and configure your new computer for under \$60! No matter whether you're buying a new computer, software, or peripherals—come see us before you buy!

## Illinois State Annuitants Association Newsletter

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## Gladly We Give

*Barbara Todd, executive director, internal campaigns*

Supporting your Illinois State University passions is what the 2009 Gladly We Give Annual Fund is all about. All current and retired employees are asked to consider what it is about our University that makes them smile, feel good, and motivates them to help build toward the future.

Is it scholarships in the department in which they work? Is it WGLT, athletics, laboratory schools, Gamma Phi Circus, or the Illinois Shakespeare Society? Are you appreciative of the Civil Service Scholarship program for the children of employees? Maybe research, computer labs, or student travel funds are most important to you.

The Gladly We Give Annual Fund for Illinois State University is an opportunity for the University to thank current and retired employees who are already donors and to encourage others to include our University in their philanthropy. Gifts can be directed to hundreds of funds within the ISU Foundation. Participation is what matters; a minimum of \$10 is all that is asked.

"Illinois State University is a great place because of the people who work here and who are willing to share their time, talents, and treasures," said Vice President for University Advancement Dianne Ashby. "Gladly We Give is not just about adding new donors or dollars, but it is also about taking time to say thank you to each and every member of the University family for all they do to help our university further its mission of educating the citizens of Illinois."

During the months of February and March, a team of ambassadors will be sharing information on the Gladly We Give Annual Fund with current and retired employees. All gifts made during the fiscal year (July 1, 2008 through June 30, 2009) are counted in this annual fund.

Despite the recent volatility in investment markets, gifting appreciated securities may still be a viable option for many donors. Stocks that have been held for several years may still have market values that are considerably higher than the donor's purchase price. When appreciated securities are gifted to Illinois State University Foundation, the donor is credited with the fair market value on the date of the transfer of the securities. Because the foundation is a tax-exempt entity, no taxable capital gains will accrue to the donor or the foundation. For more information, contact Barbara Todd at [btodd@ilstu.edu](mailto:btodd@ilstu.edu) or (309) 438-2592.



## ISUAA calendar

**March 4, 2009 11:30 a.m.–1:30 p.m.**

ISUAA Spring Luncheon  
*Old Main Room\**

**March 11, 2009 2–3:30 p.m.**

ISUAA Board w/committee chairs  
*Spotlight Room*

**March 18, 2009 noon–2:30 p.m.**

Survivor Planning Workshop  
*Alumni Center\**

**April 22, 2009 noon–2:30 p.m.**

Survivor Planning Workshop  
*Alumni Center\**

**April 24, 2009 11:30 a.m.–1 p.m.**

Advancement Lunch and Learn Seminar  
"All About Wills"  
*Alumni Center\**

**May 6, 2009 7:30 a.m.**

Advancement Spring Retiree Event  
*Brown Ballroom\**

**May 12, 2009 noon–2:30 p.m.**

Survivor Planning Workshop  
*Alumni Center\**

**May 13, 2009 2 – 3:30 p.m.**

ISUAA Board w/Committee Chairs  
*Spotlight Room*

**May 19, 2009 11:30 a.m.–1 p.m.**

Advancement Lunch and Learn Seminar  
"The Bigger Pie: Providing More for  
Yourself, Your Family, and Your  
Charities"  
*Alumni Center\**

**June 3, 2009 5:30–7:30 p.m.**

ISUAA Annual Meeting and Dinner  
*Old Main Room\**

**June 16, 2009 11:30 a.m.–1 p.m.**

Advancement Lunch and Learn Seminar  
"Retirement Planning 101"  
*Old Main Room\**

**June 23–24, 2009**

SUAA Annual Meeting  
*Springfield, Illinois*



*\* reservation required*

## University Club

*Jude Boyer*

### Gourmet dinners

The final gourmet dinner of the spring semester will be February 28 in the Founders Suite, Bone Student Center. It will feature Middle Eastern 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](http://www.lilt.ilstu.edu/uclub/gourmet_dinners.htm).

### Discussion hours

The final discussion hour of the spring semester will be May 1. Discussion hours are held on most Friday afternoons of the academic semester from 3:30–5:30 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](http://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 on the Web at [www.lilt.ilstu.edu/uclub](http://www.lilt.ilstu.edu/uclub).

## SUAA Fall Meeting

The State Universities Annuitants Association (SUAA) fall meeting took place in Urbana on October 22, 2008. Chapters from throughout the state were represented. Delegates from ISUAA were Carolyn Bartlett, Richard Dammers, Parker Lawlis, Paul Schertz, and Chuck Taylor. Speakers included Ralph Martire, executive director of the Center for Tax and Budget

Accountability, "a bipartisan, non-profit think tank that promotes fair, efficient and progressive tax, spending and economic policies;" and Dan Slack, executive director of the State Universities Retirement System (SURS).

Martire explained why Illinois needs to modify its tax structure to generate more revenue, and proposed increasing the state income tax rate on individuals from 3 percent to 5 percent. According to Martire the Illinois state and local tax burden, as a percentage of personal income, ranks 45th in the nation. For more information on CTBA and its positions, go to [ctbaonline.org](http://ctbaonline.org). Opponents would say, if you give the governor and legislature more money, they will spend it and probably not wisely.

Slack, with his counterparts from the Teachers' Retirement System and Illinois State Board of Investment, had issued a joint statement on the security of state pensions that appeared in the ISU Report in October. With the current turmoil in the stock market, there is increased interest in SURS from members of the Illinois State community. Fortunately, SURS has put together a statement called simply enough, "About SURS." This statement is helpful and useful. Packed with information in a very readable format, "About SURS" offers answers to many questions and provides a great deal of useful information. It is easy to find. If you would like to read it, go to the SURS Web site, [www.surs.org](http://www.surs.org) and click on the "about SURS" header at the top of the page.

During the business meeting, SUAA voted to discontinue the annual spring meeting primarily to save money and delay the potential need for a dues increase. The use of e-mail to share information has made this possible. This reduces the number of statewide meetings from three to two, the annual meeting in June and the fall meeting.

## Survivor Advocacy

### Survivor Planning Workshops scheduled for spring *Mary Liverman, chair, ISUAA Survivor Advocacy Team*

The ISUAA Survivor Advocacy Team has decided that because of common questions they receive upon the death of annuitants, the emotional trauma at the time of death, and the positive feedback given by last year's participants, it would be a good idea to host educational sessions on preparing for the death of an annuitant. The focus will primarily be on SURS procedures, including assistance in filling out the papers required for survivors' benefits. A "checklist" will be distributed and discussed. Small group presentations and discussions will be led by Advocacy Team members.

The groups will be limited to sixteen/twenty people for each session. Advance registration is required. It is beneficial if both the annuitant and the potential survivor attend.

The 2009 sessions will take place at the Illinois State University Alumni Center, 1101 North Main Street noon-2:30 p.m. on the following dates:

**Wednesday, March 18**

**Wednesday, April 22**

**Tuesday, May 12**

Parking is plentiful at the Alumni Center and participants may bring a sack lunch. Coffee will be available.

The same information will be covered at each session, so you only need to attend one session. For information and/or to register, contact:

Mary Liverman  
mcliverman@verizon.net  
(309)452-4181

Edna Johnston  
erjohns@verizon.net  
(309)452-5142

## Spring retiree event

Mark your calendars for the University Advancement Spring Retiree Event to be held on Wednesday, May 6 in the Brown Ballroom at 7:30 a.m. The featured speaker will be Sheri Noren Everts, provost and vice president for Academic Affairs.

Everts joined Illinois State University in July 2008 as the university's chief academic administrator. In addition, she provides leadership in the planning, development, implementation, and assessment of all academic programs and many service areas.

She previously served as interim senior vice chancellor for Academic and Student Affairs at the University of Nebraska-Omaha. She received her bachelor's degree in English and secondary education; master's degree in literacy education and English; and Ph.D. in administration, curriculum, and instruction from the University of Nebraska-Lincoln.

Invitations for this event will be mailed to all retired employees as well as to active employees who are members of the ISU Annuitants Association. For additional information please contact Barbara Todd, executive director of internal campaigns, at (309) 438-2592 or [bttodd@ilstu.edu](mailto:bttodd@ilstu.edu).

## Lunch and learn

University Advancement will again host lunch and learn seminars for current and retired employees. There is no fee to attend these seminars, and lunch is provided. All events begin at 11:30 a.m. and conclude no later than 1 p.m. Advance reservations are required.

For additional information or to make a reservation, please contact Barbara Todd, executive director of internal campaigns at (309) 438-2592.

### "All About Wills" presented by Scott Kording

Friday, April 24

Room 116, Alumni Center

Scott is a 2002 graduate of Illinois State University. He currently is an attorney in private practice with Campbell and Kording, Ltd. in Bloomington.

### "The Bigger Pie: Providing More for Yourself, Your Family, and Your Charities" presented by Drake Zimmerman

Tuesday, May 19

Room 118, Alumni Center

Drake is a financial planner with Zimmerman and Armstrong in Normal.

### "Retirement Planning 101" presented by Don Fernandes

Tuesday, June 16

Old Main Room, Bone Student Center

Don is a 1979 graduate of Illinois State University and is a financial consultant with Wachovia Bank and Trust Co. in Bloomington.

## How time flies

*Compiled by Jo Ann Rayfield*

### 1959

- The Teachers College Board approved \$1.5 million for a new Physical Education Building and Fieldhouse (Horton), \$1.4 million for a science building annex, and around \$600,000 for expansion and improvement of the University Farm.
- Smith Hall was razed to make way for the planned 10-story women's residence hall (Atkin-Colby).
- The ISU men's basketball team won the IAC championship (in March) with a record of 20-4. Dr. James Collie was named Coach of the Year.

### 1984

- December 1983 the women's volleyball team went to the 1st round of the NCAA.
- January 1984 ISU women's basketball defeated Bradley in their first ever meeting (105-52).
- The women's track team won the 5th consecutive Gateway Collegiate Conference championship with six first place winners.
- Two wrestlers qualified for the NCAA national tournament.
- February 1984 President Watkins told the Board of Regents that Illinois State spent \$300,000 for computers in Milner, Applied Computer Science, and other areas of campus.
- March 1, 1984, David Strand formally became the provost.

### 1994

- The proposed new science building (\$29.2 million) was ranked 8th on the IBHE list of capital improvements listed for FY 1995.
- Distinguished alumnus Donald McHenry visited campus to talk on the theme of "In pursuit of a New World Order" and meet with students in politics and government classes. (McHenry received an honorary Doctor of Laws degree from the University in 1980, and received the Distinguished Alumni Award in 1990).
- The PQP process was moving forward as was the search for a new provost to replace David Strand who returned to his position as vice president for business and finance.

### 1999

- An agreement was reached for Mennonite College of Nursing to become Illinois State University's sixth college and first professional program on July 1, 1999.
- President David Strand received an honorary doctorate from Srinakharinwirot University in Thailand.
- Victor John Boschini, Jr. was named the 16th president of Illinois State University. His term began July 1, 1999. Boschini had been vice president and dean of Student Affairs at Illinois State since 1997.
- Jill Hutchison, head women's basketball coach for 28 years, announced her retirement. With a record of 461-323 Hutchison's teams made a dozen national tournament appearances. She also coached successfully at the international level.

## Directory

By now you should have received your copy of the 2008-2009 membership directory. While every effort is made to ensure accurate directory information, errors do occur. Please make the following corrections to your directory: (1) The phone number for James and Barbara Brubeck should be: (309) 830-1077 and they are no longer using the e-mail address listed, (2) Dianne Clemens (not Diane Clepiens), (3) Wilbur Hofmann (not Wilbur Hoffmann), (4) C. Louis and Joan Steinburg e-mail address should be: clstei1@verizon.net, (5) Kim A. and Ronald Thompson: 2800 Via Rosso #76, telephone (217) 529-5593, Kim's e-mail: kathomp43@gmail.com, and (6) Eugene Hunter should be Eugene A. Hunter. Forward any further corrections to Dona Meador.

## In memoriam

Iva Copenbarger	October 24, 2008
David Graves	August 29, 2008
Ruth Jarrett	October 4, 2008
Marilyn Newby	August 22, 2008
E. Wayne Silvey	August 30, 2008

# ISUAA Spring Luncheon reservation form

Wednesday, March 4, 2009

11:30 a.m.

Old Main Room, Bone Student Center

Entertainment by the Linden Duo

Names of those attending: \_\_\_\_\_

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

## Entrées

\_\_\_\_ Beef roll \_\_\_\_\_(name)

\_\_\_\_ Spinach and ricotta stuffed shells \_\_\_\_\_(name)

Please send your reservation form by February 25 to: Shirlee Bottomley, 507 E. Taylor St., Bloomington, IL 61701-5334 or Dona Meador, 311 S. Towanda Ave. #4, Normal, IL 61761-6101.

*Please, no late or telephone reservations.*

