

Illinois State Annuitants Association Newsletter

ISUAAA



Volume 1 Number 4 Spring 2007

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ISUAA—serving annuitants and survivors since 1971

President's message

The annual ISUAA meeting and dinner is scheduled for 5:30 p.m. on June 20 in the Old Main Room of the Bone Student Center. This year the ISUAA board has decided to subsidize the cost of the dinner to make it more affordable for people. Among the agenda items are election of a vice president and treasurer as the terms of Sharon Quiram and Paul Schertz are expiring. Two directors will also be elected, the budget for 2007–2008 will be approved, and the ISUAA Achievement Award will be presented. A reservation form is on back cover of this newsletter. I hope to see you on June 20.

As noted in the article reporting on the SUAA spring meeting, SUAA executive director Don Naylor has retired. Don has been with SUAA since 1996 and has been a passionate advocate on our behalf. His dedication and effort are very much appreciated. We wish him well.

Thank you to the Illinois State University Golf Course for sponsoring this issue of the newsletter.

Christ Schwelle
President, ISUAA



Membership renewal

Those with single-payment memberships expiring June 30, 2007, should have received or soon will receive membership renewal information from SUAA's Springfield office. Other single-pay members will receive renewal notices as their calendar-year membership expiration date nears. Those on automatic dues deduction have continuing memberships and do not have to worry about renewal. We hope all our single-pay members do renew; when you do so, please consider automatic dues deduction. This convenient payment option is available to members receiving a SURS monthly annuity, and new this year is a payroll deduction option for "pre-retirees" still employed by Illinois State. This method of dues payment saves ISUAA/SUAA time and expense. Please renew promptly so a follow-up mailing will not be necessary.

If you would like to help add to our membership numbers and do not have your spouse enrolled, please consider that. If you're thinking about not renewing because you've been unable to attend ISUAA events, please reconsider. Certainly it is worth a couple of dollars per month to help protect your benefits even if you are not able to actively participate in chapter activities.

If you have any questions about membership, please contact Christ Schwelle, cfschwel@IllinoisState.edu or (309) 663-0230, or Paul Schertz, schertz@mchsi.com or (309) 963-4610. Thank you.

Legislative news

Social security penalties

SUAA's legislative committee reports that legislation (s206/h82) has been introduced in Congress to repeal the offset and windfall elimination provisions. Senators Durbin and Obama and Representatives Johnson and Weller are among co-sponsors. Just because legislation is introduced does not mean it will become law, but this is a positive sign. As we get information this will be forwarded to Bob Hunt for distribution to his interest group on social security penalties. If you want to join Bob's group contact him at rwhunt@IllinoisState.edu.

SURS legislative platform

The last issue of the ISUAA newsletter detailed the SUAA legislative goals. Since then the SURS Legislative Platform was released. It is similar to the SUAA goals and may be viewed at www.surs.com.

Tax restructuring

SB/HB 750 has been reintroduced in Springfield. This legislation would provide property tax relief in exchange for higher state income tax rates (from 3 percent to 5 percent for individuals and higher corporate rates) plus sales tax on some services. Increased funding for education is the primary goal. The taxing of pensions above a "base level" is included at this time. This latter provision is of concern and will be watched carefully. We are specifically concerned about how social security benefits are treated. If these are exempted from tax and SURS pension income has no similar exemption, this would be unfair, since most SURS annuitants do not receive social security benefits. Part of our pension is our basic "social security net." We are also concerned about the "base level." If a base level means that anyone with retirement income over that base must pay taxes on all such income, that is not fair. For example, if the base is \$60,000 and your retirement income is \$59,999 you pay no tax on any of that income; however, if your total is \$60,001 and you pay tax on the entire amount, that is not fair—and lousy tax policy. A better method uses an exemption of "X" dollars and one pays taxes only on

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the amount over “X.” What we suggest may seem only logical, but sometimes logic gets lost in politics. We are among those who would like to see the state’s tax structure more progressive, but a graduated income tax is not allowed under the Illinois Constitution.

Illinois retirement security initiative

One of the organizations behind SB/HB 750 is the Center for Tax and Budget Accountability (CTBA). This group published a document mentioned in the last newsletter, “Illinois Pension Funding Problems: Why It Matters.” That document resulted in several statewide retiree organizations and unions joining CTBA to form the Illinois Retirement Security Initiative, a coalition dedicated to ensure that public retirement benefits are both properly financed and designed to attract high-quality employees to the public sector. SUAA is part of this coalition along with AFSCME, IEA, IFT, and others.

Defined contribution pensions

Senator Bill Brady has sponsored legislation (SB 621) that would create a defined contribution (DC) pension plan for new employees (retirees and employees in the system would remain in the defined benefit plan). This is the direction that most private-sector retirement plans are heading. Among the problems with changing from a defined benefit (DB) plan to a DC plan is that current employees paying into the DB plan are helping to keep the system afloat financially. There are also those who feel a DC plan is actually more expensive to administer. Nebraska, for example, changed to DC and has returned to DB.

SUACTION

Thank you to all those who donated to SUACTION, SUAA’s political involvement committee. The funds will be used to support political activity that SUAA is prohibited from funding with dues income. If you did not contribute but would like to, send a check (payable to SUACTION) to SUAA, 3085 Stevenson Drive, Suite 301, Springfield, IL 62703. Please write “ISUAA” on the memo line.

The officers of the SUACTION board recently had a conference call with an attorney who specializes in election law to learn some of the ins and outs of state elections and ethics law. One important topic covered was

how to separate the political activity of SUACTION from the general business of local chapters to avoid potential conflicts with election/ethics law and to avoid compromising the colleges and universities who support the work of local chapters.

Charitable estate planning for ordinary people

University Advancement announces a “lunch and learn” seminar to be held on Tuesday, June 12, in the Founders Suite, Bone Student Center, designed to help current or retired employees understand estate planning. Lunch will be served at 11:30 a.m., with the program from 12 noon to 12:45 p.m.

Contrary to popular belief, you don’t have to be a Rockefeller, Vanderbilt, or even a Carnegie to need an estate plan. Estate planning is essential in today’s financial climate; poor planning can result unnecessary estate taxes, unclear intentions, and unexpected outcomes.

Believe it or not, you don’t even have to be a Rockefeller, Vanderbilt, or Carnegie to change lives through an estate gift. More than 80 percent of Americans contribute to charity in their lifetime, but only 8 percent continue this support through a charitable bequest or “planned gift.” When you consider your estate plan, it is possible to remember both the individuals and the organizations that have been important to you.

This brief program will include tips and ideas for creating your lasting legacy through planned giving. The session will review planned giving terminology and techniques for ordinary people. Learn simple ways you can “leave a legacy” to benefit your family and the charities that matter to you. The session will also highlight new tax laws for gifts from IRAs and planned giving methods which provide income for life.

There is no cost to attend this luncheon and seminar. However, advance registration is required. Please respond to University Events at (309) 438-8790 or UniveristyEvents@IllinoisState.edu no later than June 5. Registration will be limited to 25 participants.

Quality of Student Life Golf Classic

By Katy Killian, Student Affairs

Mark your calendar for May 21, 2007, for the annual Quality of Student Life Golf Classic at the Illinois State University Golf Course, hosted by the Division of Student Affairs and sponsored by Waugh Foods Inc. The fun will begin at 11:30 a.m. when the driving range opens. Lunch and registration will follow at 12 noon and the four-person scramble starts at 1 p.m. A steak dinner and awards ceremony at 5:30 p.m. will complete the day.

Participation in this event helps support the Quality of Student Life Endowment, which provides additional resources to the Division of Student Affairs for improving the educational experiences of students. Endowment funds have supported various initiatives, some of which include student and staff attendance and participation in various service and leadership activities, sponsorship of campus speakers, awareness campaigns related to the value of community service, and enhanced extracurricular experiences.

Register online at www.studentaffairs.ilstu.edu/qualityclassic or contact the Office of the Vice President for Student Affairs at (309) 438-5451

Medical alert

The ISUAA board has learned that local doctors, who in the past have had affiliations with BroMenn Regional Medical Center and OSF St. Joseph Hospital, may now be affiliated with only one. If you are not clearly aware of which hospital your doctor is affiliated with, you may want to clarify this before the need to be hospitalized arises.

Did you know...?

- Once you retire your "insurance representative" changes from the benefits area at Illinois State University Human Resources to SURS, (800) 275-7877, extension 0.
- Illinois State offers free tuition and fee waivers for retirees (up to eight hours per semester). Individuals have to meet entrance requirements. Contact Admissions at (309) 438-2181 to begin the process.
- Illinois State University retiree photo IDs allow free access to Bloomington-Normal Public Transit System fixed bus routes. If you do not have such an ID, contact the Redbird Card Office at (309) 438-2273 to learn how to get one. This card opens the door for all kinds of privileges. Cards are also available to survivors.
- ISUAA's Marilee Rapp is a member of the Homecoming Sesquicentennial Gala Committee. If you are interested in learning more about this event and/or would like to purchase a ticket, contact Marilee at rappmarilee@hotmail.com.
- The emeritus/retiree parking tag (gold) you have is good for another year. Also, this tag allows for free parking in Illinois State University pay lots except when a special event rate is in effect.
- The Illinois State University retiree ID card allows both the retiree and spouse access to Milner Library privileges. This could be a good alternative to the Normal Public Library if you can't find parking there.
- Bone Student Center's Jim Carlson is chair of the SURS member advisory committee (SURSMAC).
- SB/HB 750 (tax swap) is 426 pages in length.

2007 ISUAA calendar

June 12

Advancement "Lunch and Learn"
workshop on planned giving
11:30 a.m.–1 p.m., Founders Suite, Bone Student Center

June 12–13

SUAA Annual Meeting
Springfield

June 20

ISUAA annual meeting and dinner
5:30 p.m., Old Main Room, Bone Student Center

July 11

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

September 5

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

September 12

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

October

SUAA Board fall meeting
TBA

November 14

SUAA Board with committee chairs
2–3:30 p.m., Spotlight Room, Bone Student Center
TBA, fall advancement retiree breakfast

Sesquicentennial celebration events

June 14

Town of Normal/Illinois State University
Town & Gown Golf Outing

September 18

Award-winning author and historian Doris Kearns Goodwin

October 13

Sesquicentennial Gala

November 1

Award-winning documentary filmmaker Ken Burns

November 8

Country music superstar Naomi Judd

November 14

Award-winning author on education and urban issues
Jonathon Kozol



Vintage Illinois State University logo products
are now available at the Alamo II and at
GoRedbirds.com.

University Club

Jude Boyer

2007–2008 gourmet dinners

The following dates have been confirmed for the 2007–2008 gourmet dinners: Friday, September 28, 2007; Saturday, November 3, 2007; Friday, January 25, 2008; and Saturday, February 23, 2008. Menu and reservation details for the fall dinners will be available on the University Club Web site in August (www.lilt.ilstu.edu/uclub/gourmet_dinners.htm).

Discussion hours

Discussion hours are held on most Friday afternoons of the academic semester from 3:30 to 5:30 p.m. in the Faculty/Staff Commons in the Bone Student Center. Please join us for refreshments and lively conversation. Special discussion/information topics are noted on the University Club Calendar Web site. There will be no discussion hours during the summer session; the first discussion hour of the fall semester will be Friday, August 24.

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 www.lilt.ilstu.edu/uclub.

Town & gown golf outing

*By Barbara Todd, Executive
Director of Internal Campaigns*

The annual Town of Normal/Illinois State University Town & Gown Golf Outing will be held on Thursday, June 14, at the University Golf Course. Registration and lunch begin at 11 a.m., with the shotgun start at 12 noon. A social hour and dinner at 5 p.m. follow play. Cost for lunch, golf, cart, dinner, beverages, and prizes is \$65 per golfer. Individuals may attend the social hour and dinner only for \$15.

In celebration of the University's sesquicentennial celebration, a few special additions will be included this year. All golfers will receive special 150th memorabilia and drawings at dinner will be held for a 20-round pass from both the Illinois State University Golf Course and Ironwood Golf Course (must be present to win). Individuals or foursomes may register. Registration deadline is June 1. Please contact Barbara Todd in University Advancement for a registration form at btodd@IllinoisState.edu or (309) 438-2592.

Helping Hamper

By Jan Cook

Our March Helping Hamper donations to the Compassion Center were gratefully received. This collection included cold medicine and anti-virus Kleenex along with single servings of food and several kinds of tea. According to PATH, "We get an average of 50 individuals a day making use of the center's services. We are very proud of the services we provide to the homeless, as well as you yourself should be. Because of donations such as yours, we are able to meet the day-to-day needs of our clients."

The Helping Hamper at our June dinner benefits the St. Vincent DePaul Food Pantry in downtown Bloomington. They can use any canned or packaged food: meat,

pasta, vegetables, and especially fruit. And since people can't use food stamps on paper and hygiene products, items like toilet paper and tampons are appreciated, as are personal care items such as toothpaste, toothbrushes, soap, and, for summer, deodorant.

ISUAA's Helping Hamper is now two years old. It was inspired by the Civil Service Council's spring food collection for local food pantries. The recipients were selected based on their widespread outreach to the needy and four organizations are in the rotation. In the fall the Crisis Nursery at the Children's Foundation will be the recipient, along with the Clare House Soup Kitchen at St. Mary's Catholic Church in the winter. Thank you to all ISUAA members who contribute to these and other worthy causes.

Illinois State University Golf Course

By Laura Provost, Intercollegiate Athletics

The Illinois State University Golf Course provides golfers of all ages and skill levels a challenge on its tree-lined, 6,730-yard, par-71 course. Open to the general public as well as members of the campus community, the Illinois State University Golf Course also invites annuitant members to test their skills at one of the most beautiful facilities on campus.

All Illinois State Annuitant Association members receive a discount of nearly 20 percent off the regular rates when playing the course, which underwent a \$1.7 million renovation during the 2000 season under the direction of PGA Tour professional and Illinois State alum D.A. Weibring '75. For only \$17, retirees can enjoy a round of golf on weekdays, and \$20 for weekends. With a cart, golfers can hit the course on the weekday special for \$23.

Season passes and frequent player cards are an excellent choice for the avid retiree golfer, with rates as low as \$600 for a season. And for only \$50, members receive a special nine-hole card which includes 10 rounds of golf. Add a golf cart to the special and the cost is only \$63.

The golf course has added a brand-new Web site, www.isugolf.com, to allow golfers another convenient

way to arrange tee times as well as register for electronic specials and a golf course e-newsletter. By registering online, golfers will receive not only a free round on their birthday, but also be eligible for discounts on future rounds of golf. Specials also include merchandise in the course's pro shop, which becomes the exclusive retailer of Nike sideline apparel worn by Illinois State's coaches, athletes, and staff beginning in July.

There are also many opportunities for retirees to enjoy each other's company while playing a round of golf at the course. A retirees league is conducted on Thursdays, beginning at 8 a.m. The "Tee-Birds" are a group of retired Illinois State faculty and staff and their spouses who play nine holes every week. New members are always welcome and skill level is never an issue.

Information on how to join the "Tee-Birds" can be found on the course's Web site. Play begins on May 17.

For more information on all that Illinois State University Golf Course has to offer, visit www.isugolf.com or call the pro shop at (309) 438-8065.

SUAA spring meeting

The SUAA spring meeting was held at Kishwaukee Community College on March 13. Representing ISUAA were Jan Cook, Paul Schertz, and Chuck Taylor. Don Naylor has retired as SUAA executive director. Replacing Don is Linda Brookhart, who had been vice president for the Taxpayer Federation of Illinois and the Illinois Tax Foundation. Topics covered included Governor Blagojevich's budget proposal, SUAA's 2007-2008 budget, and the possibility of a \$6 dues increase (to be voted on in June). A Lobby Day in Springfield is scheduled for April 25. The luncheon speaker was Mitch Vogel, president of the SURS Board of Trustees, who conveyed that he believes the governor finally realizes there is a pension funding problem

In memoriam

Olive Aldrich, March 3, 2007
Thomas Arndell, March 9, 2007
Buford "Duffy" Bass, March 14, 2007
Marilyn Boyd, January 22, 2007
Alta Bryant, March 14, 2007
Pauline Cottone, August 4, 2006
Clara Gifford, December 1, 2006
Norma Hagle, February 15, 2007
G. Alan Hickrod, December 27, 2007
Doris Jensen, April 1, 2007
Jacqueline Karch, January 10, 2007
Glenn Krueger, January 13, 2007
Margaret Lawrence, March 17, 2007
Lois Lilly, February 23, 2007
Susie McKown, February 17, 2007
Anna Merrick, August 12, 2006
Martha Miller, February 28, 2007
Elizabeth Newbold, December 18, 2006
Eva Rediger, August 27, 2006
Sue Roehm, February 25, 2007
Ralph Schroeder, August 24, 2006
Edward Schapsmeier, February 10, 2007
Marilyn Tegenkamp, February 22, 2007
Adahlia Wendland, March 25, 2007
Jeannette Whiteside, August 21, 2006

ISUAA annual meeting and dinner reservation form

Wednesday, June 20, 2007

5:30–7:30 p.m.

Old Main Room, Bone Student Center

Names of those attending: _____

Please reserve _____ meals at \$10 each. A check for \$_____ payable to ISUAA is enclosed.

Entrees

_____ Sweet-and-sour chicken over rice _____ (name)

_____ Pasta primavera _____ (name)

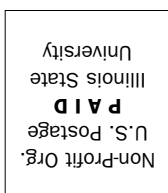
*Please send your reservation form by June 11 to Shirlee Bottomley, 507 East Taylor Street, Bloomington, IL 61701-5334,
OR Irene Niccum, 301 South Towanda Avenue, #C, Normal, IL 61761.*

Please, no late or telephone reservations.

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