



Volume 2 Number 4
Spring 2008

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ISUAA—serving annuitants and survivors since 1971

President's message

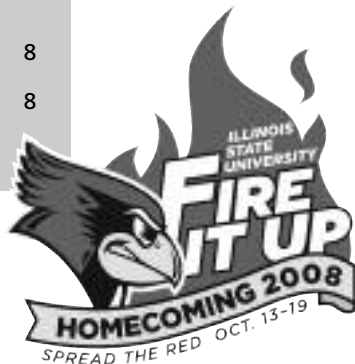
To those of you who attended the March 5 ISUAA luncheon, thank you for the birthday card! I regularly miss the March luncheon for a family get-together somewhere warm and sunny.

The ISUAA annual meeting and dinner is scheduled for 5:30 p.m. June 4 in the Old Main Room of Bone Student Center. Once again the ISUAA board has decided to subsidize the cost of the dinner to make it more affordable. Agenda items include: election of a president, a secretary and two directors.

Just prior to putting this newsletter together I received an annual report of the McLean County Historical Society. Included in the report is a list of those who volunteered for the organization during 2007. A lot of you are on that list and a lot of you serve as volunteers in other community organizations. Thank you for contributing to the quality of life in our community.

We also extend thanks to the sponsor of this issue of the newsletter, the Weibring Golf Club at Illinois State University. Hope to see you at the annual meeting and dinner.

Christ Schwelle



Visit www.alumni.ilstu.edu/homecoming/ for the latest homecoming plans.

ISUAA calendar

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 • 11a.m. – 1 p.m.

Spring Advancement Retiree Luncheon
*Ewing Cultural Center**

June 4, 2008 • 5:30 – 7:30 p.m.

ISUAA Annual Meeting/Dinner
*Old Main Room**

June 12, 2008 • 11:30 a.m. – 1 p.m.

Advancement Lunch and Learn Series,
The Pros and Cons of a Living Trust
*Founders Suite**

July 9, 2008 • 2 – 3:30 p.m.

ISUAA Board w/Committee Chairs
Spotlight Room

September 3, 2008 • 11:30 a.m. – 1:30 p.m.

ISUAA Fall Luncheon
*Old Main Room**

September 10, 2008 • 2 – 3:30 p.m.

ISUAA Board w/Committee Chairs
Spotlight Room

**Indicates reservation required*



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Weibring Golf Club at Illinois State University

By Laura Provost, Intercollegiate Athletics

The Weibring Golf Club at Illinois State University 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 Weibring Golf Club 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. For only \$19, retirees can enjoy a round of golf on weekdays, and \$22 for weekends. With a cart, golfers can hit the course on the weekday special for \$25.

Season passes and frequent player cards are an excellent choice for the avid retiree golfer with rates as low as \$640 for an unlimited season pass or \$440 for a weekday pass. As a special offer, annuitants are eligible to receive one special nine hole card that includes 10 rounds of golf for \$60. Members can add a nine hole golf cart to the special for an additional \$63.

A good source for information regarding the program and services the Weibring Golf Club has to offer is the course Web site, www.isugolf.com. By registering online, golfers will receive a free round on their birthday and a monthly newsletter, as well as receive advanced notice of other golf and merchandise specials.

One specific program offered to Illinois State Retirees is the "Tee-Bird Golf League." The "Tee-Birds" are a group of retired ISU faculty and staff and their spouses that play nine holes every week. New members are always welcome and skill level is never an issue. League play begins at 8 a.m. on Thursday May 15. Information on how to join the "Tee-Birds" can be found by following the "League" tab on the course's Web site at www.isugolf.com.

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

Legislative scene

As the deadline for this newsletter approached, there was not much new to report relative to the status of retirement benefits. SUAA continues to increase its visibility with legislators as SUAA Executive Director Linda Brookhart and lobbyist Dick Lockhart visit with legislators. Brookhart has also been cultivating relationships with representatives of other state retirees/employee groups.

SUAA chapter representatives statewide have been attending fundraisers and other political events. Attending such events frequently allows interaction with legislators other than the one benefiting directly from/sponsoring the event. SUAAAction, SUAA's political action committee, now covers the cost of this. This has resulted in a SUAA presence at many more of these events. Among the fundraising events attended were ones for Sen. Emil Jones and Rep. Michael Madigan.

As one listens to legislators discuss state pensions there is now the acknowledgment that these pensions are constitutional obligations that cannot be ignored. In fact after the governor's State of State message one legislative leader stated that while many may not like it, the pensions are constitutionally protected and must be funded. This understanding seems much more widespread than it did a few years ago.

A major concern at this point is that some interest groups will push for a state Constitutional Convention (Con-Con) to void the constitutional obligation relative to state pensions. This is something that SUAA and others representing state retirees and employees are watching carefully. Whether or not to call for a Con-Con will be on the November ballot. A Con-Con could achieve some positive things for the citizens of Illinois, but the potential threat to state pensions makes the risk too great. It's too bad, but that's reality based on experience with politics. That said, many believe that voiding the obligation could be successfully challenged legally on behalf of current annuitants and employees currently participating in SURS, TRS, etc. However, any such threat needs to be headed off at the earliest possible point.

Many may not be aware that our colleagues from state community colleges, while members of SURS, do not have the same health benefits. This is a result of their being employees of local districts rather than "the state." They are covered by the College Insurance Program (CIP), which is a state fund that is "financially challenged." SUAA is supporting bills to improve the viability of CIP. The bills are SB 2595 and HB 5361.

SB2288 is the new "tax swap" legislation, which would increase the state income tax rate in exchange for property tax relief. One of the co-sponsors is Senate President Emil Jones, who opposed last year's tax swap efforts. This piece of legislation will be closely watched as will other bills with potential impact on SURS members.

SUAAAction continues to evolve as the group responsible for collecting voluntary donations and distributing funds for political purposes on behalf of SUAA members. A particular legislator or candidate's support of the interests of SURS participants, or position to successfully support such interests, is the most important criteria for SUAAAction support – far more important than their other political stances. ISUAA's Christ Schwelle continues to serve on the SUAAAction's board of directors. As cited earlier, SUAAAction is now actively funding political activity on behalf of SUAA members.

Relative to Social Security offset penalties, Bob Hunt continues to head the ISUAA interest group. Members have been communicating with members of Congress citing how these penalties affect them personally.

Homecoming 2008

By Barbara Todd, executive director internal campaigns

It is not too early to start thinking about Homecoming, as campus staff has already begun making plans for the fall 2008 celebration the week of October 13-19. Events on Saturday, October 18, include the Town and Gown 5K Run at 7 a.m.; parade step-off at 9:30 a.m.; football kickoff at 2 p.m.; and an evening celebration at the new Alumni Center.

In addition, this year the Alumni Association extends a very special welcome to all retired faculty and staff at the tailgate tent. Beginning at 11 a.m. until game time, plan to stop by for a few minutes or stay the entire time to enjoy complimentary snacks as well as the fellowship of other annuitants, current faculty/staff, and alumni. We know alumni who return to campus for Homecoming are hoping to see their former faculty and staff. Help make their Homecoming celebrations special by being in the tent to greet them.

To stay abreast of Homecoming plans, go to www.alumni.ilstu.edu/homecoming/.



WANTED

Old newsletters

Jude Boyer continues to work on organizing the ISUAA archives. A lot has been accomplished so far, but in order to complete the task, we need to locate some old newsletters. If you have any of the following issues, please contact Jude at: jboyer1@ilstu.edu or (309) 827-2826.

1982: May and November

1983: February

1984: November

1985: February, May, August and November

1986: February, May, August and November

1987: February, May, August and November

1988: February

Helping Hamper

By Jan Cook

Our March Helping Hamper donations to the Compassion Center filled a station wagon! This collection included ChapStick and chewing gum as well as single servings of food, and disposable cups and plates. PATH says, "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 personal hygiene products, in the summer items like soap and deodorant are deeply appreciated.

At our March luncheon we started collecting "Box Tops for Education" for Thomas Metcalf School, and had almost 450 to turn in to PTO. We will do this again at our June dinner. The rectangular postage stamp size "box tops" are printed on the edge of packaging of many household products. If you cannot attend the dinner, and would like to contribute, please send these to Jan Cook, 17438 E. Walden Rd., Hudson, IL 61748.

FAQ on planned giving

By Barbara Todd, executive director internal campaigns

Planned giving to Illinois State can take several forms: Life insurance, bequests, trusts, and annuities, to name a few. Some planned giving options can provide a gift to the University and a stream of income to you. A charitable gift annuity pays you a fixed dollar amount each year for the rest of your life. You receive a guaranteed annual payment no matter what happens to investment markets or interest rates.

There may be significant tax advantages when you set up a charitable gift annuity. A portion of the value of the transaction is considered a charitable gift, which may be deductible from your adjusted gross income. If you use appreciated property to fund a gift annuity, you can avoid paying capital gains tax on the charitable gift portion of the transaction. The remaining gain will be apportioned over your lifetime. Learn more about charitable gift annuities and other planned giving options by calling (309) 438-7681. Go online to www.ilstu.edu/plannedgiving for more information, and a gift calculator that shows how a charitable gift annuity might benefit you and the University.

Spring Retiree Luncheon

By Barbara Todd, executive director internal campaigns

If you haven't made your reservation for the University Advancement Spring Retiree Luncheon on Tuesday, May 20, and wish to attend, please call Barb Todd immediately at

(309) 438-2592 to see if you can attend. This will be a great event at Ewing Cultural Center, with lunch under a tent, remarks from President Al Bowman, information on both the Manor and Genevieve Green Gardens, and time to enjoy the gardens with local experts to answer your questions. If the weather doesn't cooperate, the event will take place at St. John's Lutheran Church across the street.



Did you know?

- Once you retire your "insurance representative" changes from the benefits area at ISU Human Resources to SURS (1-800-275-7877 ext. 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 438-2181 to begin the process.
- ISU retiree photo IDs allow free access to BN Public Transit fixed bus routes. If you do not have such an ID, contact the Redbird Card Office, 438-2273, to learn how to get one. This card opens the door for all kinds of privileges. Cards are available to survivors.
- The emeritus/retiree parking tag (gold) you have is good for another year if it is shaped like the state of Illinois. The rectangular tags expire this summer. Parking Services plans to start distributing new tags mid-late July. They ask that people bring their emeritus/retiree photo ID card and suggest watching their web site or calling (309) 438-8391 if you have questions. 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.
- The "panic/emergency" button on the key fob for your car can have a long range, perhaps enough to keep at your bedside so that if you have an emergency at night you can set off the car horn and attract the attention of neighbors or scare off a potential intruder.

Programs on survivor planning popular

On February 21, the ISUAA Survivor Advocacy Team had their first educational session for possible survivors. The team had 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. Five couples and two individuals attended the session led by team members Mary Liverman and Edna Johnston.

After some opening comments by Mary and Edna, the bulk of the session was devoted to reviewing copies of actual sample letters and forms mailed to survivors by SURS, and relative to insurance, Central Management Services. These were part of each packet distributed. Mary and Edna took attendees through each document and attendees asked questions and took notes on the letters/forms so that when the time comes they will be better prepared to promptly meet the requirements necessary to obtain survivors' annuities and insurance coverage.

Among the specific topics discussed was the wisdom of obtaining an adequate number of certified death certificates for SURS, insurance companies, banks, 403b/IRA firms, vehicles and other property transfers, etc. These certified death certificates are less expensive and more convenient to obtain from the funeral home at the time arrangements are made. Participants agreed that the material they received and related documents should be kept in one location and their children or others should know where that is.

Additional sessions for different participants were held on March 20 and April 9 and 24.

The final session this spring will occur May 15. If you are interested in attending one of these sessions and unable to do so, contact Mary at mliverman@verizon.net or Edna at erjohns@verizon.net. Also, both are in ISUAA Directory. Additional sessions for the summer or fall are a possibility.

SUAA spring meeting summary

The State Universities Annuitants Association board of directors spring meeting was held in Carbondale March 12. Illinois State chapter delegates attending were Jan Cook and Paul Schertz.

The lead topic was the 2008 Constitutional Convention Referendum (see article on legislative scene). Dick Lockhart, SUAA's lobbyist, and Linda Brookhart, SUAA executive director, addressed this topic in detail. Lockhart also updated delegates regarding new legislation of interest, which is at the early stages of the legislative process and being analyzed by Lockhart, Brookhart and SUAA's legislative committee.

Various association reports were also given. When the report on membership was given the Illinois State chapter was acknowledged for being a model of membership recruitment and stability, consistently enrolling more than half the retirees as members.

The SUAA annual meeting will be in Springfield June 17 and 18.

Alumni Relations events

*By Barbara Todd, executive director
internal campaigns*

The Alumni Relations office extends an invitation to attend two upcoming Illinois State University alumni events.

The first is a very unique theater opportunity in Chicago at the Victory Gardens Theater. On Saturday, June 6, the Alumni Association in partnership with the School of Theatre will celebrate the Chicago premier of "Relatively Close." This show was produced by Illinois State alumnus James Sherman and had its world premiere on the Illinois State campus featuring student performers. The Alumni Association will host a reception prior to the show. Join us for an evening of great entertainment and networking!

On Saturday, July 12, President and Mrs. Bowman will again host ISU Alumni Night at the Shakespeare Festival. The evening will feature dinner on the lawn of the beautiful Ewing Cultural Center, a Green Show, opportunities to tour the Shakespeare Theatre and the main performance of "Taming of the Shrew."

For more information or to register, please call (309) 438-2586 or visit: www.alumni.ilstu.edu.

Membership renewal

Those with single payment memberships expiring June 30, 2008, 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 membership and do not have to worry about renewal. We hope all our single pay members do renew, and when you do so please consider automatic dues deduction. This convenient payment option is available to members receiving a SURS monthly annuity and there is a payroll deduction option for "pre-retirees" still employed by Illinois State. These methods of dues payment save 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.

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

In memoriam

Jeanne Blines	December 25, 2007
Earl Erxleben	January 27, 2008
Lloyd Farlee	December 1, 2007
Arley Gillett*	January 25, 2008
Marjorie Gullett	February 7, 2008
Harry Miller	January 6, 2008
Kathleen Randles	December 8, 2008
Glen Sanderson	December 17, 2008
Donna Simms	January 8, 2008
H. Leon Tipsord	December 4, 2007
Ronald White	January 13, 2008
Wesley Wilcox	January 1, 2008
Vickie Wilson	February 10, 2008

**Arley Gillett was ISUAA president 1989-90*

ISUAA Annual Meeting and Dinner reservation form

Wednesday, June 4, 2008

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

_____ Roast beef _____ (name)

_____ Cheese manicotti _____ (name)

Please send your reservation form by May 23 to: Shirlee Bottomley, 507 E. Taylor St., Bloomington, IL 61701-5334 or Irene Niccum, 301 S. Towanda Ave. #C, Normal, IL 61761-2110.

Please, no late or telephone reservations.

Lunch and Learn Series a hit

The Lunch and Learn Series programs sponsored by Illinois State's University Advancement are proving to be very popular with reservation slots filling quickly. The first of these took place February 26 with certified financial planner Bryan Crabtree's presentation on "How to Enhance and Protect Your Retirement Nest Egg." Attendees learned about the financial risks of retirement, how to allocate retirement assets, why time in the market is more important than timing the market and how to increase current and future income. On April 24 a session entitled "Retirement Planning 101" is scheduled (after the deadline for this newsletter). "The Pros and Cons of a Living Trust" is scheduled for June 12.

If you were unable to attend any of these sessions, but are interested in future similar sessions, contact Barbara Todd, executive director internal campaigns at btodd@ilstu.edu or 438-2592.

Financial planning was also discussed at an event hosted by the College of Business on February 20. After discussing careers in financial planning with students, Sheryl Garrett, author and founder of the Garrett Planning Network, a group of fee-based financial planners, led a session for current faculty staff and annuitants that was well-received by those in attendance.

University Club

By Jude Boyer

2008-2009 Gourmet dinners: The following dates have been confirmed for the 2008-2009 Gourmet dinners: Friday, September 26, 2008; Saturday, October 25, 2008; Friday, January 30, 2009; and Saturday, February 28, 2009. Menus 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 of 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 22, 2008.

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.

