

“ISUAA – serving annuitants and survivors since 1971”

2003-2004 Issue No. 2, November 1, 2003 Co-Editors, Jack Hobbs and Parker Lawlis

Illinois State Annuitants Association Newsletter
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INSIDE THIS ISSUE

The Editors

All of us have been amused and amazed by California politics in which a Hollywood actor known for bodybuilding, violent movies, and a German accent replaced an elected governor.

But the politics in Illinois are no less bizarre: A former Republican governor who, under investigation for scandals in his earlier job as Secretary of State, was on the short list of nominees for a Nobel Peace Prize. The current Attorney General, a Democrat, along with other Democratic leaders, seeks to reinstate the death penalty (which the former governor abolished). And a Democratic governor (who was supported primarily by educators) seems to be no friend of education and public services in general.

In his President's Message (p. 2), Parker Lawlis says this is no time to be complacent. He urges all of us to become actively engaged and make Illinois politicians aware of our concerns. In his Legislative Report (p. 3), Tom Wilson says things are quiet in Springfield, but that's probably because the legislature has not been in session since May. He warns, however, that Blagojevich may declare a financial emergency and try to use retirement funds as collateral to borrow money.

Also in this issue, look for **Announcements** (p. 3) about the Holiday Luncheon, Board Meetings, University Club, Redbird Cards, and the 55 Drive Alive Course. Patricia Grogg urges us to consider donating to **The Family Campaign** (p. 4). Martha Burk would like others to step up to the task of working on the **Civil Service Open Line** (p. 5). A group of library faculty are putting together a data base of faculty research from 1857 to the present; see **Illinois State Normal**

University Faculty Research: A Bibliography, 1957-2007 (p. 5)

There is also news about **ISUAA Golf League** (p. 7), the new **Annuitant's Web Page** (p. 6), **Long Term Care** (p. 6), the **Speech and Hearing Clinic** (p. 7), **Redbird Cards** (p. 8) and **Recent Deaths** (p. 10). And don't neglect to fill out your reservation for the **Holiday Luncheon** (p. 9)

PRESIDENT'S MESSAGE Parker Lawlis

ISUAA is quite involved in the political process in Springfield. Much time has and is continuing to be spent with SURS and the SUAA to develop a plan to participate in the legislative process. The chapter is trying to form some alliances with others who have the same concerns about our pension plan and the benefits. At this time we are taking nothing for granted.

I was on campus last week talking to a recent retiree and his friend, Joe who said, "We don't have anything to worry about, the State will continue to provide us with our pension, the 3% increases per year and the health insurance." I said to him, "While we would hope that this is the case, these are difficult times and we must be on alert to make certain that our benefits remain intact." We need to watch the Fall veto session, which will begin in November.

ISUAA, SUAA and State University Retirement System does not support pension fund consolidation because it removes the educator's (both retired and active) voice in making decisions relevant to pension fund investment policy. Pension fund consolidation could reverse several victories that have

guaranteed the rights of retired educators to influence their pension fund investments.

Your leadership is concerned about the SURS pension and the individual benefits! In this Newsletter is a listing of the local (Normal area) Legislators. It is time to develop a relationship with all of the ones listed. You can make a call, write a letter, send an e-mail, make a contribution, or work on their campaign. But please be prepared to make some form of contribution to the overall effort that is needed to make the "Politicians aware of your concerns".

On the National level, there is discussion about calling for a vote to bring the "Social Security Offset Provision" out of committee so that the Congress can vote on this issue. SUAA has had a committee working on this problem for a number of years-it appears that some headway may have been made.

Legislative Addresses and emails

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Email: sommer@mtco.com

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IMPORTANT ANNOUNCEMENTS

Holiday Luncheon

Barbara Glenn and the social committee have arranged a really festive meal to be held on Dec. 10. You will find the reservation form for the Luncheon on page 9 of the Newsletter. Menu: Honey Glazed Ham, Au Gratin Potatoes, Tossed Salad, Garden Peas, Roll and butter, Butter Pecan & Apple Pie, Coffee and Ice Tea. Only \$9.00 per person.

Program: Mr. and Mrs. Santa and "sing-a-long" with Jim Roderick

ISUAA Executive Board

The board meets on Wednesday, November 10, 2003 in the Spotlight Room, BSC at 2:00 p.m.

ISU Foundation

The ISU Foundation will host one breakfast meeting, and Interim President Al Bowman will host his annual reception in the second semester.

University Club

ISUAA will sponsor the University Club on Friday, December 5, 2003 in the Faculty Commons area of the Bone Student Center from 3:30 to 5:30 p.m. All annuitants are invited to attend the scholarship presentations from the University Club at 4:30. If you would like to become a member of the University Club, come, or if you are not sure, come anyway.

55 Drive Alive Course

Thanks to the 10 annuitants who completed the 8-hour class, the program was very informative and helped those who took the to reduce their car insurance premiums!

Handling an Estate

This class had to be canceled due to lack of interest. We may try to hold it in the Spring.

Thanks

To the **Membership Committee** for their hard work and the Chairperson, Don Kachur. Can we reach 1,000?

LEGISLATIVE REPORT by Tom Wilson, Co-chair

Except for the moans and groans about the budget, things have been quiet in Springfield since the Legislature adjourned in May. The financial situation is not good, but perhaps not as bad as we've been led to believe.

General funds receipts for Illinois in the first quarter of the fiscal year 2004 (July 1 – Sept. 30, 2003) were \$6.467 billion, up from \$5.747 billion in the first quarter of FY2003. This is a 12.5% increase. The bad news is that most of the increase is accounted for by larger amounts of federal grants. The irony is that the national government is worse off than the State, but does have the power

to borrow money for almost any reason with no questions asked.

The only major decline in tax sources for Illinois was in the inheritance tax, which was down from \$76 million in the first quarter of FY2003 to \$42million (-44.7%) for the first quarter of FY2004. This may in part be the result of Illinois trying to grab as much as possible from this tax source.

Illinois passed legislation in May that “decoupled” the state from the federal phase-out of inheritance taxes. What this means in reality is that if you're affected, you'll pay a lot more in tax to the State and little or nothing in federal taxes.

People in the U.S. can easily change legal residence, and if you have a fair amount of money, it's easy to have one house or condo in Florida and one in Illinois and make Florida the legal residence. Thus, by trying to grab more, Illinois may actually lose some inheritance tax money as well as other taxes paid by these “former” Illinois residents.

The big taxes in Illinois were up slightly in the first quarter of FY 2004, with the personal income tax revenue increasing by 1.2% and the sales tax increasing by 1.0% from the first three months of FY 2003 (July 1 – September 30, 2002). These two taxes account for 75-80% of the total state tax revenue. In spite of all this, it is very possible that around mid-November, Governor Blagojevich will declare a financial emergency and try to use the retirement system funds as collateral for a loan.

As noted before, Illinois is looking at ways to cut pension costs. SUAA is beginning an effort to research what legal protection we have, particularly

from the Illinois Constitution. I think we have about six months before anything happens, but we need to be prepared on both the legal and political fronts. More on this later.

THE FAMILY CAMPAIGN
Patricia M. Grogg, Co-Chair of The
Family Campaign

Do the Facts Say it All?

Illinois State University has 1416 living annuitants. Of the 1416, 166 or about 12% have made a gift to the University's first comprehensive fundraising Campaign: Redefining "normal". Another 265 have made a recent gift to the University.

Recent gifts that are not Campaign gifts are annual gifts, much appreciated, which show considerable support by retirees for programs they care about. Combining annual gifts and Campaign gifts, about 30% of annuitants are donors at some level to the University.

The remaining 985 have never made a gift to Illinois State University.

What do the above facts mean?

My training and experience in inference don't let me draw too many conclusions. When I talk with annuitants about possible gifts to the University, I hear different responses. Non-donors say, "My gift was my work; I wasn't well-paid, so I actually contributed part of my work." It's true that: salaries do not always keep up with talent or with market value. A gift—supporting current faculty/staff activities—helps deal with this ongoing problem.

A retiree who chooses not to give adds: "A personal situation keeps me from making a gift. I had a difficult time with a certain individual, and I don't

want to make a gift to an institution that hired him/her." That's true, too. A large organization has situations, which come down to personality conflicts.

Sometimes these are not resolved and leave "a bad taste." Students are seldom involved in these personality clashes; scholarships keep what's really important happening.

Students are the biggest reason donors contribute: "I want to leave a legacy to help students." Or, "I know how important discretionary dollars are in departments. I give a little every year to help with those extras for faculty." Or, "I'm making a big gift via stock and a bequest, because I still believe that the best thing for our nation is educating young people, and the public university comes closest to the realization of the democratic ideal."

What do our University careers mean in our lives?

Can we get beyond a tough interpersonal situation to do a good thing for the students of today and tomorrow? Will we leave a legacy, which goes beyond the direct influence we had while on the job?

Another incontrovertible fact is that life does not last forever. Our decisions about how we live and what we give can expand opportunities, bless future generations, and enhance our own good work. I often remember Marc Antony's words in his eulogy for Caesar that too often the good is interred with the bones. Good teaching and learning lives on in our students. 30% of annuitants continue to add goodness to Illinois State through their financial contributions. Would that others might join them to benefit the University of today and tomorrow.

OPENLINE PREPARATION

Martha Burk

The Civil Service Council OpenLine occasionally includes flyers or additional newsletter pages that need to be folded and inserted (stuffed) by hand. Seven people have been doing this work for years: Lyle Augstin, Joanne Hartman, Marge Irving, Lois Lindholm, Owen Minear, Caroline Ober, and Marilyn Wahls . These dedicated people have decided it is time to step down. The Council wishes to extend a heartfelt thanks to all of them. Your service is greatly appreciated!

Help is needed. The Council would also like to extend an invitation to anyone who would be interested in helping with future Openlines. The group receives a call about 3-4 times a year to do these inserts. They meet in the Conference Room at the Human Resources office in the Nelson Smith building. This is a great opportunity to enjoy good fellowship with fellow annuitants while also helping the Council by stuffing the OpenLine.

Please call (438-3474) or email (mjburk@ilstu.edu) Martha Burk if you would be interested in helping out.

Illinois State Normal University **Faculty Research:** **A Bibliography, 1957-2007**

In anticipation of the 150th anniversary of Illinois State University, a group of faculty from Milner Library has begun to compile a bibliography of publications by faculty members of ISNU and ISU from 1857 to the present. The bibliography, which will be published in electronic form, brings

together into a single source the names of all past and present University faculty, along with basic biographical information, and a listing of each faculty member's scholarly publications. To preview the database, please go to the following Web Site:

<http://www.mlb.ilstu.edu/test/facpub/>

The major benefit of the project is the creation of a permanent historical record of Illinois State University faculty publications that would be accessible to researchers worldwide. This record will serve as a tool for historical, educational, statistical, and empirical research related to Illinois State University, its faculty, and its curriculum (past and present).

To date the first 100 years (1857-1957) of the project have been completed. The goal is to finish the remaining 50 years and have the database available for the 150th Anniversary of Illinois State University in 2007. University Research Grants funded the project in the past, but now additional sponsors are needed to continue the project. Contributions in any amount would be appreciated. Please make checks payable to ISU and write "ISU Bibliography" on the memo line of the check. Checks should be sent to Toni Tucker, 8900 Milner Library, ISU.

For additional information on the project, please contact Vanette Schwartz (438-3486, ymschwa@ilstu.edu), Bruce Stoffel (438-5313, brstoff@ilstu.edu), or Morag Boyd (438-3446, meboyd2@ilstu.edu).

ANNUITANTS WEB PAGE

Richard Erzen

ISUAA now has a web page. It is a work in progress but will improve and be more informative in the future. Its "call letters" are www.annuitants.ilstu.edu. Currently, you will find a list of our officers and board members, a partial meeting schedule, and the last four issues of our Newsletters.

We owe special thanks to Sarah Walczynski and Tom Fowles for the development of our site. Sarah, of LILT, revised and set up the original format, and got us underway. Tom, from Human Resources, volunteered to help us maintain our page. Since Human Resources is the ISU "home base" for ISUAA, it is logical to have someone from that organization assist us with the maintenance of our site. Tom posted most of the information you will find on our page. Access to experts such as Sarah and Tom is another benefit we receive from ISU.

I will continue to serve as liaison between ISUAA and Human Resources and assist with the maintenance of our site. Please direct any questions and/or comments to me (rgerzen@ilstu.edu or phone 454-4160).

LONG TERM CARE MEETING

The meeting for Long Term Care will be held in the Spotlight Room of the Bone Student Center on Wednesday, November 19 at 1:00 p.m. Interested persons should call Parker Lawlis at 452-5309 to reserve a seat. As you are probably aware, Midwest Retirement Group is now associated with the SUAA as marketing consultants for the association's Long Term Care insurance

program. In conjunction with LTCI Partners, we are expanding the marketing efforts so that all SUAA members and potential members have access to pertinent information relating to Long Term Care and its financial implications. We seek to develop a strong working relationship with active SUAA Chapters through chapter meetings, workshops, direct mail, personal contact, telecommunications, and Internet.

THE ISU SPEECH AND HEARING CLINIC

Did I hear you correctly?

The ISU Speech and Hearing Clinic provides complete hearing testing for ISU Faculty/Staff and their immediate families. You may just be curious about your hearing or the hearing of a family member. You may feel you or a family member have some hearing loss but have never had a hearing test.

You may have questions about hearing aids. Could I benefit from a hearing aid? How do I acquire a hearing aid? How much would a hearing aid cost? How long is the trial period? You know you have a hearing loss but have not had a recent hearing evaluation.

You are invited to be a client of the Speech and Hearing Clinic. Appointments are about an hour. Call 438-8641 for an appointment.

ISUAA GOLF LEAGUE

The thirty some golfers had their annual awards luncheon in September under the leadership of Frank Matsler and his able committee members. Meaningful prizes (see page 8) were given for the lowest score, least putts, most consistent, best attendance and accuracy in score

keeping—fewest mistakes on the scorecard. Pictures of a few of the golfers are below.



From left: Paul Dohrman, Dick Erzen, John Kirk, Duffy Bass, Roger Cushman



From left: Dave Wiant, Jo Wiant, Mary Watkins, Lloyd Watkins

VETERANS DAY Tom Fowles

We gather on Veterans Day to acknowledge and celebrate the contributions of all students, alumni, faculty, staff, and annuitants who have served in the military. This year we will give special recognition to those students, faculty, staff, and annuitants who have died in service to their country. Please help honor all of our veterans in the Bowling & Billiards Center Activity Room on Tuesday, November 11th at 12:00 noon.

Immediately following the formal program (approximately 12:45pm), a brief ceremony will be held at the flagpole on the Quad.

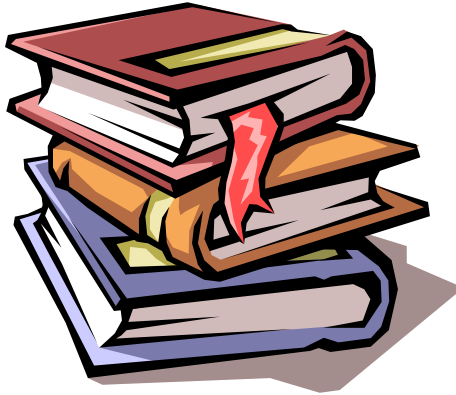
Please come early to view the exhibits, share with colleagues, listen to patriotic music, and enjoy some light refreshments prior to the ceremony.

Veterans may pick up commemorative yellow ribbons at Veterans Services (Moulton 112) from 9:00-11:00am and at the entrance to the Bowling & Billiards Center from 11:30am until the start of the ceremony at 12:00 noon.

Meet the officers



From Left: Sharon Quiram, Paul Schertz, Jan Cook, Andy Nappi. Our president, Parker Lawlis, is out of the picture—literally, not metaphorically.



Redbird Cards

Annuitants and survivors can obtain a "Redbird Card" on the second floor of the Bone Student Center. The "photo identification" card will assist you with ISU activities.

Survivors need to contact Jan Beer, Human Resources, for a letter to present at the "card" office for identification.



Pete Whitmer and J. Russell Steele are the conservators of the golf prizes

RESERVATION FROM FOR THE ISUAA HOLIDAY LUNCHEON MEETING

Wednesday, December 10, 2003, 11:30 a.m. (doors open at 11:00)
BALLROOM of the ISU Bone Student Center

Names of those attending _____

Reserve _____ meals at \$9.00 each. Total amount \$ _____

Make check for total amount payable to: ANNUITANTS ASSN., and mail check and this reservation form by December 5, 2003 to BARBARA GLENN, 57 Ravenwood Circle, Bloomington, IL 61704

WE REGRET TO REPORT THE DEATHS OF:

Hyle Atkins	July 30, 2003
John H Wesle	August 6, 2003
Steve G. Mocilan	August 10, 2003
Marjorie H Heiken	September 1, 2003
Frederick H Schenck	September 3, 2003
Leonard M Wrice	September 15, 2003
Joanne I. Radliff	October 7, 2003
Daniel J Dickerson	October 13, 2003
Charles E. Shaw	October 14, 2003