



Northern Illinois  
University

# THE NIU ANNUITANT

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**May 2019**

## President's Report

By Lynn Neeley, NIUAA President

This note outlines NIU Annuitants Association (NIUAA) actions from the recent past and previews a few upcoming events. The information is organized as news, progress, opportunity, and fellowship for NIUAA members.

### News

Our webpage has a new look that Chris Doe, our Secretary, has guided us through over several months.

**Look at the updated page to read the draft of minutes from our 6 June 2018 meeting at <https://www.niu.edu/annuitants/index.shtml>.** Toni Tollerud and Deborah Haliczner organized our NIUAA booth and presentations for the 2019 NIU Wellness Fair in April. Toni directed our wonderful group of Board member volunteers to help attendees find stress reduction techniques.



Clair Williams and the Scholarship committee members have excelled in their efforts to establish our Endowed Scholarship, and the first recipient has been recognized.

As most of you know, we have a new Illinois Governor and Legislature, who may hold considerable sway over

our retirement, health benefits, and for Illinois residents, State income tax rates. Jim Lockard has sent us frequent email updates on issues that have been especially important, and he has included several of the more current and pressing issues in this Newsletter.

### Progress

The Board is presenting in this Newsletter proposed changes to the NIUAA Bylaws to reflect our current financial situation with new language for the Treasurer and changes to the Audit Committee, as well as changes to codify the composition and duties of the Awards Committee. The entire Board worked on these proposed changes with Al Mueller, Clair Williams, Joe Grush, and Jim Lockard making exceptional contributions.

Good colleagues and friends are a joy.

### Fellowship

Margaret Phillips has outdone herself once again. More than 60 persons enjoyed our Coffee at Oak Crest in February. The business part of the Coffee was informative, and several people took advantage of the facility tour. Bright sunshine, good food, and long-time friends were all integral parts of the Spring Luncheon at River Heights Clubhouse in March. Pleasure with the new-to-us facility, format, and menu, with parking at the door may bring us back again. Our Member Reception will follow the June 5 Membership Meeting with a buffet served in the the same room as the meeting, the Yusunas Room of the DeKalb Public Library. A good elevator, easy ramps, and free parking surrounding the building should make our access easy.

### Opportunity

The June 5 Membership Meeting will give you an unparalleled chance to talk with Tom Demmer, the 90th and Jeff Keicher, the 70th districts' Representatives. They will share insights on the current legislative session and will be available at the following reception to chat with interested members about issues facing the Assembly

See you there!

*(Continued on next page)*

*(President's Report continued)*

### Requests

I have **three** requests.

Send us your current email address so that we can get information and invitations to you sooner, save the environment, and save NIUAA money. Contact Chris Doe with your contact information at this address:

**[AnnuitantsAssoc@niu.edu](mailto:AnnuitantsAssoc@niu.edu)**

If you have your NIUAA dues deducted from your SURS payment, please check your SURS receipt to see if all the monies deducted or withheld from your payment are correct. Our current NIUAA dues are \$36 per year or \$3 per month per member. If your SURS receipt shows some deduction other than that, please ask SURS to deduct the correct amount.

**Our 5 June 2019 meeting must move briskly because of a full agenda. Please read the six-page draft minutes of the 6 June 2018 meeting ahead of time under the Meetings and Reports heading of our webpage at <https://www.niu.edu/annuitants/index.shtml>**

## Scholarship Fund Endowed Drive's Goal Achieved

As of March 29, 2019, donations to the NIU Annuitants Association Scholarship Fund totaled \$54,000. That matched the fund drive's goal of \$50,000 for the establishment of an endowment and \$4,000 for scholarships to be awarded in the amount of \$2,000 for academic years 2019-20 and 2020-21. The earnings from the endowment will be used to fund scholarships in 2021-22 and afterwards.

The establishment of the endowed Scholarship Fund was only possible because of the members of the Association who made donations, some of whom donated more than once. The members of the Scholarship Committee are grateful for their generosity and send them our heartfelt thanks.

Future donations to the Fund will be added to the endowment providing the opportunity to increase the amount of the scholarships to be awarded in future years. <https://www.niu.edu/annuitants/donate/index.shtml>

A major "thank you" to the Scholarship Committee for their energy and commitment in accomplishing this important aspect of our purpose.



### First NIUAA Scholarship Recipient Announced

*Ariana Powell, Business Administration major, with Committee Members Clair Williams and Joe Grush.*

## Legislative Report

By Jim Lockard, Legislative Chair



As always issues related to pensions remain a top concern. Here are some points of interest.

### Pensions per first State of the State Address by Governor JB Pritzker

- Move Pension Ramp target from 2045 to 2052
  - Critics object because it reduces payments to the pension systems now, as did past “pension holidays.”
- Sell \$2B in Pension Obligation Bonds (Gov. Blagojevich sold \$10B, but redirected part to general use)
  - Critics call this repeating past errors and “kicking the can down the road.”
- Transfer state assets to pension funds (sell or sign over – Thompson Center, Tollway, ...)
  - Critics say transfers aren’t “real money” as such assets are not cash and may not be liquid in a time of need. They could also take money from the state’s income stream. When New Jersey did this, it also immediately reduced payments from general revenue to the pensions for no net gain.
- \$200M dedicated to pensions from graduated income tax
  - Critics note the “fair tax” requires amending the Constitution in 2020 at the earliest, with actual revenue from the change coming first in 2022.
- Consolidate small, local funds
  - Whatever the details, there are far too many small, locally operated pension funds for police and fire personnel, often managed by boards with no expertise.
- Bond rating agencies complain that Pritzker’s plan just repeats past mistakes.

### Pension Recommendations from Vocal Outside Groups

- **Raise taxes, pay all benefits earned**  
See the major details of the proposals from representatives of the largest businesses in Illinois, the Civic Committee (<https://www.restoreillinois.org/>) and Civic Federation (<https://www.civicfed.org/iifs/FY2020IllinoisRoadmap>)
- **Amend Constitution to cut benefits yet to be earned**  
by changing / removing the Pension Protection clause.  
Is a pension amendment more likely because of the need for a tax amendment? The governor seems committed to paying all promised benefits, but the two legislative leaders, Mike Madigan and John Cullerton, both supported the previous attempt to reduce pension

benefits. Only the Supreme Court blocked that move, so a further attempt seems possible.

### Senate Bill 60

In June 2018 a bill passed that lowered the threshold for salary increases in the years counting toward a pension from 6% to 3%, after which the employer must pay the full cost of the pension increase caused by those salary increases. Currently in the Assignments Committee, SB60 would restore the 6% threshold. This is effectively a brake on salary increases near retirement, which seems unfair, but it came as a response to employers (notably, school districts) “spiking” pensions with large salary increases as a reward for retiring, knowing most of the cost would fall to the state, not the district. Still, many districts have paid substantial penalties to the state for exceeding the limit.

### Illinois Exodus – Are High Taxes to Blame?

The *Tribune* is one of many organizations loudly complaining that the state is losing population. Population loss is a fact demonstrated by census data, and the potential loss of a House seat in Washington is a genuine concern. However, the reasons behind the loss may not be the two most commonly given: high taxes (which critics say will only get worse if the state adopts a progressive income tax) and an anti-business mentality.

Consider that Minnesota has led the region in population growth every year since 2011, even as it increased income tax on corporations and the very wealthy and increased the minimum wage and indexed it to inflation. Interesting comments about taxes and population appeared in a *Chicago Tribune* (2-12-19) opinion editorial pointing out that the Center for Tax and Budget Accountability reported in 2018 that taxes rank far below the primary reasons people move, which are job opportunities, to be closer to family and friends, or overall cost of living. The report also found that the rate of outmigration was twice as high among persons earning \$25k or less than for those earning \$100k or more. Finally, in early April *Crain’s Chicago Business* began an article as follows: “When Illinois’ income tax rate jumped a record 67% earlier this decade, critics warned it would drive away the wealthy who invest in businesses and jobs. Instead, IRS data show, the wealthy flourished.” The analysis of data by the Better Government Association is very useful in countering arguments against a progressive tax and provides interesting insights on in and out migration. You can read the original article at <https://www.bettergov.org/news/poor-left-rich-thrived-when-illinois-hiked-flat-tax>



## Report On The SUAA Foundation

By Andy Small, SUAA Foundation Representative

The SUAA Foundation has received \$10,574.00 in receipts, gains, and other support from January 1 through September 30, 2018. This brings the current amount of assets to \$102,497.71, which is in the Bank of Springfield. So what does this money do for us?

### Education

The legislative process is complex and unpredictable. We help SUAA members understand the issues being discussed in Springfield, how they affect current and retired members, and how the state's serious financial challenges require all SURS members to pay close attention to what happens at the state Capitol.

### Advocacy

It is not enough to simply understand the policy decisions in Springfield. Our experienced SUAA is at the Capitol meeting with lawmakers, developing legislation and legislative positions, and tirelessly building new relationships to ensure your interests are protected and promoted. We also turn to our local chapter leaders to help build relationships and advocate on our top issues when legislators are back in their districts.

### Scholarship Program

The SUAA Foundation has just announced its new Scholarship program. The SUAA Foundation will offer up to four scholarships of up to \$500 per scholarship annually. The scholarships will be awarded for use in accredited degree-seeking programs, eligible technical/trade programs, eligible certificate programs, and for professional development (travel expenses are excluded). The applicant must be an SUAA member in good standing or the spouse/partner, child/step-child or grandchild/step-grandchild of an SUAA member in good standing.

<https://suaa.memberclicks.net/foundation-scholarship-program?servId=7473>

### Engagement

By next January, between 30 and 40 new legislators will be serving in the general assembly. That is nearly a quarter of the Legislature turning over. We need all current and retired workers at our colleges and universities working with SUAA to meet their legislators, talk with them about the issues, write letters and emails, and make phone calls. No matter where you work or live, you can make a difference!

The SUAA Foundation is a 501(c)(3) organization, recognized by the IRS as a public charity. Your gift may be declared as a charitable donation if you itemize deductions on your tax return.

If you have already donated to the SUAA Foundation, we thank you for your support! If you have not, please consider supporting us.

**Remember: Together we are stronger!!!**

## Report On SURS



By John Engstrom, SURS Board Member

The biggest news from SURS is the changes in the Board, mostly due to the change in state administration. All of the appointed members are being replaced. Three new appointed Board members are:

1. **Rich Figueroa** is an investment professional and is currently Chief Investment Officer of Barrett-Lo Visionary Development. Rich was previously on the Board.
2. **Jamie-Claire Flaherty** is the Director of Strategic Initiatives for the Obama Foundation, and
3. **John Lyons** is a Partner of the law firm DLA Piper (US).

As of this writing, the new board Chairperson and one member have not yet been appointed. Please check the SURS website (<https://www.surs.org>) for more information on these appointees and for news about the remaining appointments.

A recent report on the Commission on Government Forecasting and Accountability indicated that SURS had the highest market value funded ratio of the state plans (42.6%) as of June 30, 2018. The average for the state plans was 40.2%. Of course, these numbers are far too low. During the past fiscal year, SURS tied TRS for the highest earnings at 8.3%. Through March of this fiscal year, our earnings are approximately 3%.

SURS staff is extremely busy. Some of the more recent activities include:

1. Implementation of the inactive member buyout,
2. Implementation of the buyout of half the AAI for active members,
3. Implementation of a new supplemental defined contribution plan, designed especially for Tier II members,
4. Selection of providers for the current and new supplemental defined contribution plans,

5. Equipping and moving of some employees to a newly purchased building at 1801 Fox Drive, next door to the current facility,
6. Long-range planning for needed technological changes, and
7. Monitoring legislative activities and responding to requests for information by the legislature.

It has been a pleasure to serve as a member of SURS for the past 10 years, and now Vice-Chair. I urge you to periodically check the SURS website ([surs.org](http://surs.org)), especially to read *The Advocate* (SURS newsletter) when it is posted.

## NIUAA Education Committee Report

The Education Committee collaborated with members of the Board to sponsor a table at the April 3 NIU Health and Wellness Fair. We presented a stress inventory, and suggestions for managing stress. These are available if you missed the event.

Two workshops are scheduled for NIUAA members and their guests.

### “Career Planning for Retirement”

This workshop, hosted by the NIU Annuitants Association, will lead members in conversation on career and leisure options after retirement. Panelists will discuss what strategies they have used to fully enjoy leisure, learning, work, and other meaningful activities.

Date: Monday, June 10. 1:00-3:00.

DeKalb Public Library. Bilder Family Meeting Room.

### “Future Planning with Family”

This workshop, hosted by the NIU Annuitants Association, will model the sometimes scary conversations that need to occur between the older generation and younger members of the family, on topics ranging from talking about wills, health, fears, and finances to end of life decisions. The workshop will be led by mother-daughter duo Deborah Haliczzer and Elena Haliczzer, and will reflect the different perspectives of two generations on difficult topics.

For information, and to make your reservation to attend, please contact Deborah Haliczzer at [dhhaliczzer@gmail.com](mailto:dhhaliczzer@gmail.com)

Join us for the

### NIU Annuitants Association Annual Meeting

5 June 2019, 3:30 to 5:00 p.m. in the

**Yusunas Room of the DeKalb Public Library**

Followed from 5:00 to 6:00 p.m. by a

### MEMBER RECEPTION

**Great Snacks, Good Company**

**See you there!**

## Agenda of the NIU Annuitants Association Membership Meeting

5 June 2019, 3:30-5:00 PM, Yusunas Room,  
DeKalb Public Library, DeKalb IL

Call to Order and Welcome

Approval of Agenda

Approval of June 2018 Meeting Minutes

Treasurer's Report

Committee Reports

Audit

Culture & Travel

SURS

Scholarship Fund

Revised NIUAA Bylaws

Motion to Adopt Revised Bylaws

Summary of the Proposed Revisions

Amendments from Floor (if any)

Vote on Motion to Adopt

Election of Officers and Directors

Background of Nominees

Vote on Slate of Candidates

Appreciation Award(s)

Presentations

Tom Demmer, 90th District Representative

Jeff Keicher, 70th District Representative

Catherine Squires, President and CEO of NIU  
Foundation

Matt Streb, Liaison to NIUAA, NIU President's Office

Concluding Remarks

Adjournment

## Proposed Changes: Bylaws of The Northern Illinois University Annuitants Association

### Add to Article V. Duties of the Officers and Board of Directors

4. b. The treasurer shall submit a report of the Association's receipts, disbursements, and cash balances at each Board meeting and the annual membership meeting. The treasurer's annual financial statement shall be audited by the Audit and Finance Committee appointed in accordance with Article VI.1.a. The Committee shall report its findings to the Board. After acceptance by the Board, the Committee's report shall be published in the next issue of the Association's newsletter and be presented to the membership at the Annual Meeting.
- c. The Treasurer shall submit an annual report as required by SUAA in accordance with its reporting deadline.

### Add to Article VI. Committees

2. a. **Audit and Finance Committee:** This committee shall conduct an annual audit of the records of the Treasurer as specified in Article V. 4. The committee is charged with preparing a forecast of receipts and expenditures prior to the start of each association fiscal year and making recommendations to the Board on the purchase of Certificates of Deposit including the amounts to be invested and their durations. The committee shall be comprised of three members.
- b. **Awards:** This committee shall nominate, for recognition by the membership, one or more individuals within or outside the Association who have made significant contributions of leadership or service to the organization. Nominees will be recognized in an appropriate way at the Annual Meeting or an NIUAA special meeting.

### In Memoriam

William Baker	David Johnson
Abraham Bass	Bernice Kayes
William Brown	Wayne Kersten
Thomas Burkart	Elaine Lauth
Elene Chastain	Robert Maple
Edward Curzon	Penny McIntire
Marilyn Derrington	Esther Mocega-Gonzalez
Dorothy Durr	Fred Pugh
Mary Finnan	Helen Tande
Robert Frederickson	Joyce Terry
Margie Holliday-Howland	

## NIUAA Board Nominations 2019

### OFFICERS

#### Past President: Lynn Neeley - Retired Faculty

Lynn was Professor of Management and Associate Dean of the College of Business. She chaired the Presidential Commission on the Status of Women and was President of the U.S. Association for Small Businesses and Entrepreneurship. She is a City of DeKalb Financial Advisory Committee member.

#### President: Deborah Haliczzer – Retired Supportive Professional Staff

Deborah served as Director of the NIU Employee Assistance Program and as Assistant Vice President of Human Resource Services. She was a member and President of the Supportive Professional Staff Council. She served as Chair of the University Benefits Committee, and received both the SPS Presidential award and the Wilma Stricklin award for Enhancing the Climate for Women.

#### Vice President: Andy Small – Retired Operating Staff

Andy has served as the SUAA Foundation Representative. He was employed for over 30 years as lab manager for the Department of Chemistry and Biochemistry. He has been the recipient of the Outstanding Service award. He was President of the Operating Staff Council. He chaired the Employee Advisory Committee to the Merit Board of the State Universities Civil Service System.

#### Treasurer: Al Mueller – Retired Supportive Professional Staff (2nd term)

Al is the current NIUAA Treasurer. His NIU career spanned over thirty years in technology and administrative positions in the NIU departments of Information Technology, Human Resources, and Procurement. He volunteers with the NIU Newman Center and the DeKalb Kishwaukee Kiwanis.

### DIRECTORS

#### Director: Michael Fortner – Retired Faculty

Michael served as Associate Professor in the NIU Department of Physics in the area of high energy physics. In addition, he served in the Illinois State legislature as the Representative from the 49th District.

**Director: John Hulseberg – Working Operating Staff (2nd Term)**

John is the Operating Staff Personnel Advisor and Assistant Foreman for the Paint Shop. He has served on the NIU Operating Staff Council and the Benefits Committee. He has been an officer on the CASA Board. John served on NIU's Program Prioritization Task Force and the DeKalb County Board. He is an NIU alumnus.

**Director: Sabrina Hammond – Retired Supportive Professional Staff**

Sabrina worked in the NIU Division of Information Technology, beginning in the Telecommunications area and moving up through increasingly responsible positions in the customer service, planning, and management functions. She is an NIU alumna, with bachelors and master's degrees from the university. She served as a member of SPS Council

**Director: Carole Minor – Retired Faculty**

Carole is a Distinguished Teaching Professor Emerita in the Department of Counseling, Adult and Higher Education. Carole has been active in the League of Women Voters. She was a member of the Presidential Commission on the Status of Women and is a recipient of the Wilma Stricklin Award for Enhancing the Climate for Women on campus.

**Director: Toni Tollerud – Retired Faculty (2nd Term)**

Toni is a Distinguished Teaching Professor Emerita in the Department of Counseling, Adult and Higher Education. She has served as Acting Associate Dean in the College of Education, and as Faculty and SPS Personnel Advisor. She heads the NIUAA Survivor Assistance Team and serves as the NIUAA representative on the University Benefits Committee.

**CONTINUING BOARD APPOINTMENTS**

**Past President:** Lynn Neeley

**Secretary:** Chris Doe

**Director:** Norden Gilbert

**Director:** Chuck Miller

**Director:** Leroy Mitchell

**Political Involvement:** Michael Peddle

**NIUAA Trips and Event Schedule 2019 - 2020**

by Steven Johnson, Culture and Travel Committee Chair

**Upcoming Events**

May 25 - June 4:	Wonder of the American West
June 12 - 27:	Alaska and the Yukon
July 17:	LES MISERABLES at the Cadillac Palace, \$129
July 22 - 26:	Stratford Festival of Canada
July 28:	CUBS at Miller Field (waitlist only)
Aug. 16 - Sept. 3:	Voyage of the Vikings from Rotterdam to Boston
Sept. 14 - 24:	London and Country, and Paris
Oct. 2 - 13:	German Grandeur Riverboat Cruise from Munich to Basel
Nov. 19 - Dec. 20:	Amazon River Cruise
Nov. 30:	Chicago Shopping and Museum Day, \$20.19
Dec. 3 - 10:	Christmas Markets of Austria & Bavaria

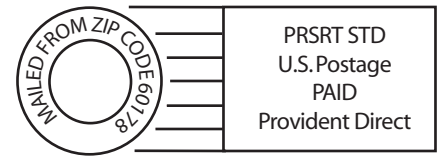
**2020 Events**

Jan. 5 - 14:	Polar Vortex Escape Cruise
Feb. 16 - 22:	Pre-Mardi Gras New Orleans
Feb. 16 - Apr. 5:	African Safari (South Africa & Victoria Falls)
March 16 - Apr. 5:	Circle Hawaii Cruise
June 25 - July 5:	Oberammergau and the Best of Germany



NIU Group in Mackinaw City





## NIUAA 2018-2019 Officers, Directors, and Committee Chairs

### Officers

President . . . . .	Lynn Neeley . . . . .	721 Ellwood Ave, DeKalb, IL 60115 . . . . .	(815) 758-2536 . . . . .	Neeley1NIUSUAA@gmail.com
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