



Northern Illinois
University

THE NIU ANNUITANT

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November 2019

President's Report

By Deborah Haliczzer, NIUAA President

I am impressed with the engagement and commitment of our NIU Annuitants Association members. When I read the local and NIU news, I see the impact of our members on local matters, organizations, and broader causes that affect our university and community. Our members sit on the County Board, city councils, and professional organizations. Our members are involved with most local agencies, community organizations, and advisory boards. Many of our members continue to be involved in research, service, conferences, and consulting activities. Many do research and publish books and articles. NIUAA members, whether actively employed or retired make a difference in the NIU community. When I hear from our NIUAA members who live outside our region or the State of Illinois, I hear that so many are engaged in similar activities and are involved with NIU through their membership, professional research, and service. NIUAA members contribute substantially through volunteering, mentoring, or through their donating to NIU departments, colleges, museums, or to scholarships. I am proud to be the new president of this wonderful group of engaged colleagues.

This week, the DeKalb Chamber of Commerce held its annual ATHENA Award reception. Margaret Phillips, longtime NIU staff member and member of our NIUAA Board received one of two "Woman of Achievement" awards for her extensive community service. We have Margaret to thank for organizing most of our NIUAA events and social occasions. The other recipient of this recognition was Sue Doubler, another NIUAA member. Our congratulations go to both.

News

On October 22, President Lisa Freeman, also a member of NIUAA, gave the 2019 State of the University address. Despite challenges to state funding of public higher education and demographic factors that affect student enrollment, President Freeman had many positive facts to report, and presented an optimistic enrollment picture. (See *NIU Today*, October 24: <https://www.niutoday.info/2019/10/23/president-freeman-highlights-energy-optimism-impact-during-first-state-of-the-university-address/>) New university initiatives include

the "Huskie Pledge," which is aimed at allowing more students to access higher education at NIU. Another initiative is the "Huskies Give Back," which encourages employee volunteerism by providing some release time for volunteer activities.

More positive news includes the expansion of amenities at the Holmes Student Center and the renovation of the Martin Luther King Jr. Memorial Commons. These two campus assets have great importance to our history, to members of the Annuitants Association, and to our colleagues in the Lifelong Learning Institute (LLI). New degree programs and support for faculty research are all positive steps. Faculty and staff will benefit from expanded family leave; the tenured faculty union ratified a new contract; and faculty and staff will receive raises. Though many of our members are now retired, the wellbeing of our actively employed colleagues, and of our NIU students are causes we have all worked to support. And, I should point out, many of our colleagues who are still employed at the university are members of NIUAA.

The University is planning an extensive commemoration of the 125th anniversary of NIU. The planning committee has worked with many constituencies to organize an array of events and activities to mark this anniversary year. Reading Professor Earl Hayer's *Education in Transition: The History of Northern Illinois University* (NIU Press, 1974) and President Bill Monat's later *The Achieving Institution: A Presidential Perspective on Northern Illinois University* (NIU Press, 2001), I have learned some anecdotes that I did not know, despite my decades at NIU as a student and employee. I suggest you might like to visit the NIU historical archives for more history. So many of our association members have made significant contributions to building NIU from a Teacher's College to the university of today. Some of you will see your names in these books.

Appreciation

NIUAA is served by a dedicated Board. Our officers, Directors, and Committee chairs work hard for the good of the organization. I want to take this opportunity in particular to thank our member John Engstrom for his exceptional service to NIUAA, SUAA, and SURS. He served for a decade as one of our first elected SURS Board members, earning high praise from SURS administrators and fellow Board members. He served NIUAA and the SUAA Foundation Boards with dedication, always providing expertise, wise counsel, and excellent reports

(Continued on next page)

(President's Report continued)

to NIU Board and membership. John recently resigned from his SURS position. His regular reporting here on the activities of the SURS Board will be greatly missed, and our Board wishes him well.

Other NIUAA Board members whose terms expired this year include Michael Gonzales, Ferald Bryan, and Clair Williams, and our Past President Joe Grush. These individuals have always delivered extraordinary service to this organization. As November is a month for giving thanks, let me add a few more:

- **Lynn Neeley** has become our Past President. In her term she provided stellar leadership, information, and excellence in all she did.
- **Matt Streb**, our liaison with the Office of the President, has been reliable in delivering timely and useful information on all topics related to the university. We always welcome his comments.
- **The NIU Credit Union** and **Mark Lenaway**, its Executive Director, sponsored our fall NIUAA Coffee. We appreciate their sponsorship.
- **The DeKalb Public Library** has hosted our group for meetings and for our annual meeting. And they hosted two of our Professional Development events. It is a great facility, and I could not help noticing how many NIU names were listed as contributors.
- **State Representatives Tom Demmer (R-Dixon)** and **Jeff Keicher (R-Sycamore)** attended the spring meeting of the Association and shared with us their sense of the 101st General Assembly; they surveyed major issues confronting the Assembly and analyzed a number of topics raised by questions from members. We thank them very much for their time, their insights, and their willingness to attend.
- We greatly appreciate the fact that **Oak Crest** sponsored an association coffee last winter, and the **NIU Foundation** sponsored a social event for the Association last year in the Barsema Alumni and Visitor's Center.
- **The NIU Foundation**, including **Catherine Squires** and **Judy Schneider**, has been great a partner, through their annual help also in the production and distribution of our newsletter and their collaboration on starting our NIU Scholarship.

News from the State Universities' Annuitants Association

NIUAA is one chapter of the SUAA. Several of our members attended the June 2019 general membership meeting of SUAA. At the meeting, Executive Director, Linda Brookhart, and members of the Executive Committee reported on a year's work that resulted in some major changes for SUAA and the SUAA chapters.

The most significant change was that the membership, by a close vote, changed the former SUAA structure (from Board, representing all the public university and community college chapters with an Executive Committee elected from the Board, to an "Assembly of Delegates" representing the SUAA chapters). Instead of the former Board consisting of some 130 "Directors," the former Executive Committee is now the new SUAA Board, elected through a general election. Some members felt this change was more efficient and limited liability exposure to a much smaller Board. Others expressed concern that this change would limit Chapters' voices in SUAA business. At the June meeting a motion to assign the right to approve the SUAA budget and dues to the SUAA Assembly of Delegates was narrowly passed.

Elections were held by SUAA at the June meeting for vacant SUAA Board positions. Our NIUAA member, Steven Cunningham, was unanimously elected by our district to one of the seats. This is a great opportunity for our chapter to have a representative who is highly knowledgeable about pensions and benefits and able to represent the concerns of our members, whom he knows well from his years as Vice President for Human Resources. Steve and his family have returned to Illinois, and NIUAA congratulates Steve on his election to the SUAA Board.

More News

Many of you have asked about flu shots. NIU offered two flu clinics. But you can also receive your flu vaccine at the DeKalb County or other county health department. Bring your insurance card and Medicare card (if you have Medicare). Vaccines are widely available at physicians' offices and major pharmacies such as Lehans, Osco, Walgreens, etc. Before you go, check to see if the vaccine is available, as many of them have temporarily run out. The higher dose flu vaccine for individuals over 65 has been available mostly at large pharmacies. But supplies have fluctuated with delivery shipments. Call first. But try to get a flu shot before January.

Great News

The excellent work by the Scholarship Committee (Clair Williams, Joe Grush, and Norden Gilbert, now joined by Toni Tollerud), coupled with the impressive generosity of our members resulted in creating an NIUAA Endowed Scholarship in record time. We were able this year to sponsor our first scholarship recipient. Thanks to all who contributed. Information on how to donate further is posted on the NIUAA website. (<https://www.niu.edu/annuitants/index.shtml>).

Chris Doe, our Secretary, has worked to update our website. Our thanks go to her for helping keep up with membership and for serving as liaison with SUAA and the Division of Information Technology. Updates on annuitant email will be available at a later date when available, so watch our NIUAA emails and our website.

Bylaws...Again

NIUAA voted to approve updates to our organization's bylaws at the June meeting. However, at the June SUAA meeting, SUAA changed its bylaws, and as a consequence, every chapter must now make bylaws updates. We have convened an ad-hoc committee to update our NIUAA Bylaws... again. After November's fall SUAA meeting of the Assembly of Delegates the committee will work on updates. My personal thanks to the current and past bylaws committees and to the Board for its patience and careful reading.

Membership

The Board is convening a Membership Committee to work on increasing our membership recruitment among retirees and among current faculty and staff. As we have seen in the past, one of the most effective ways to recruit new members is an approach by an NIUAA member to a colleague. Some current employees remain unaware of our organization, or do not know that we represent BOTH retired and current NIU employees who contribute to the SURS. We are an organization that represents our interests at the State level. We need to retain the members we have and to increase our membership. As the chief advocacy and lobbying group working to protect our pensions and benefits, we need members, and we need their modest monthly dues payments. And we need all of you to start the conversation with colleagues about what our NIU Annuitants Association does and why they should join.

I have made a career talking about stress relief, wellbeing, and wellness. In closing, I hope that as winter arrives, you all enjoy good health, good times with family and friends, and a perhaps a vacation or two. Ignore a few news reports, and read something relaxing and intellectually stimulating. Use your Silver Sneakers benefit and get exercise. Take a break from stress. Take a course with LLI, enjoy concerts and the excellent NIU museums. Thanks for listening.

Take care,

Deborah Haliczer
NIUAA President

Celebration of NIU's 125th Anniversary

By Jerry Zar

In the November 2018 issue of The NIU Annuitant, I noted that an NIU committee had been established to plan 2020 celebratory events for the 125th anniversary of the institution's founding in 1895 (though it didn't open its doors until 1899). It is a committee of about 25, representing faculty, staff, students, alumni, retirees, and the community, co-chaired by Matt Streb, the NIU President's Office Chief of Staff, and Reggie Bustinza, the Executive Director of the NIU Alumni Association.

I am a member of this committee and two of its subcommittees, representing the NIU Annuitants Association, and I give to you this progress report.

Regular meetings of the committee and its subcommittees have planned numerous events to occur throughout 2020, though final dates are not yet established for some of them. For example, there will be a formal opening event in late January, a special celebration on July 15 (the date DeKalb was chosen as the site of the new school), and a formal closing event in early December. During the year, there will be a lecture series, major photographic and other exhibits regarding the institution and its history, visual and performing arts presentations (including a performance of an Avalon String Quartet commission), and homecoming events in both the spring and fall semesters. And special events will occur at NIU's satellite campuses in Naperville, Rockford, and Hoffman Estates.

There will also be some interesting new features at NIU's website. For example, an interactive map will show the development – and great expansion – of the campus over time. And a list of 125 “key moments” (not one per year, but 125 total) will be described. These 125 descriptions will be released in small batches throughout the year and will note significant historical events such as the creation of the Illinois State Normal School in 1895, Northern Illinois State Teachers College in 1921, Northern Illinois State College in 1955, and Northern Illinois University in 1957. Also noted will be the terms of the institution's 13 presidents, the formation of the university's seven colleges, and other milestones in academics, research, athletics, student affairs, and more.

Look forward to announcements of events throughout 2020 via local newspapers, local radio stations, and the Internet.



Legislative Report

By Jim Lockard, Legislative Chair



Overall, the installation of JB Pritzker as Governor of Illinois appears to have ushered in a period of relative legislative calm on the pensions and benefits front. The Democrat legislative majority increased at the same time. I am aware of no legislation that would adversely affect NIUAA members. Even the SUAA web site has little under Legislation beyond the 2019 Legislative Platform.

A few items to note:

1. After years of wrangling with former Gov. Rauner, Pritzker quickly reached a new contract deal with AFSCME. My concern about potential major changes to our healthcare benefits in a new contract has not materialized. I can provide a union-issued summary of changes, including some modest increases in cost for current employees as of January 1, 2020. Retirees with 20 years of service still will pay no premiums for healthcare coverage. Having seen no other information, I assume for now that the terms of the contract will also apply to SURS participants, as they have in the past.

2. Many organizations that have opposed our pension benefits in the past, notably the Civic Committee of the Commercial Club of Chicago and the Civic Federation, appear finally to have accepted the ruling of the IL Supreme Court guaranteeing those benefits. There is some agreement that there is no one solution to the pension challenges. On the other hand, another arch-critic, the Illinois Policy Institute, is raising even more alarms than before. For example, IPI filed a lawsuit challenging the validity of several past bond sales from which some revenue passed into the pension systems. Had the IPI suit succeeded, the impact on the bond market and the state's finances broadly is unclear, but certainly not helpful. Fortunately, the suit was dismissed, with the judge writing that the lawsuit "resembles far more of a political stump speech than it does a legal pleading." <https://www.pionline.com/courts/illinois-judge-rejects-call-invalidate-state-pension-bonds>. Especially disturbing is the widespread reporting of whatever the IPI has most recently put out, with rarely any critical discussion of its position, much less the accuracy of its claims. Take, for instance, the claim that nearly 40% of state spending on education goes for pensions, a number certain to raise eyebrows at the least. <https://www.illinoispolicy.org/nearly-40-of-education-spending-consumed-by-pension-costs/>. Then repeated in such examples as: <https://madisonrecord.com/stories/513126600->

[pionline.com/courts/illinois-judge-rejects-call-invalidate-state-pension-bonds](https://www.pionline.com/courts/illinois-judge-rejects-call-invalidate-state-pension-bonds). Especially disturbing is the widespread reporting of whatever the IPI has most recently put out, with rarely any critical discussion of its position, much less the accuracy of its claims. Take, for instance, the claim that nearly 40% of state spending on education goes for pensions, a number certain to raise eyebrows at the least. <https://www.illinoispolicy.org/nearly-40-of-education-spending-consumed-by-pension-costs/>.

Then repeated in such examples as:

<https://madisonrecord.com/stories/513126600->

nearly-40-of-education-spending-consumed-by-pension-costs.

<https://prairiestatewire.com/stories/513126218-state-spending-36-percent-of-money-allocated-for-education-on-pension-costs>.

Of course, this claim ignores the fact that state spending on education is a much smaller percentage of the total than local spending, despite the legal "obligation" of the state to provide primary funding. Furthermore, does any school district divvy up its revenue in such a way as to put only state money toward pensions?

3. Lori Lightfoot succeeded Rahm Emanuel as mayor of Chicago with an overwhelming victory in the election. Lightfoot campaigned "fully aware" of the fiscal challenges facing the city. Barely 3 months in office, she acknowledged the budget gap was significantly larger than her most pessimistic expectations. A large share of the gap stems from pension obligations, and she believes only a unified approach from the state has any hope of addressing the problem. While speaking to a IBEW union meeting on August 27, she conceded (as an attorney, perhaps) that pensions are a legitimate obligation, but also spoke of a need for "structural changes," which apparently would focus on the 3% Automatic Annual Increase or COLA, which she calls "unsustainable." While the mayor correctly (in my opinion) points out that pension problems exist within every community across the state, not just Chicago or the state systems themselves, the magnitude of the underfunding of Chicago (23% funded) and state employee pension systems (ca 40% funded overall) causes the rest of the state to pale in comparison. It will be a tough sell to get downstate legislators and voters to agree to their systems being lumped in with the others, regardless of their individual status. Regardless, the governor remains strongly in favor of consolidation, as recommended by his task force on pensions.
4. Taxpayers United of America says Illinois pension plans are "doomed." The group says the governor's efforts at consolidation won't accomplish much and loudly calls for a Constitutional Amendment (CA) to "fix" the Pension Protection Clause. Among the errors or misinformation in the linked article, the TUA President claims the average annual state pension is \$56,148 and that retirees worked, on average, only 20 years. No doubt both claims surprise you, but many voters will accept them as fact, which will stoke demand to cut pension benefits. Thus far I have seen no instance in which a proponent of a CA acknowledges that the existing Tier II was

implemented without a CA or that its benefits are so much lower than those for Tier I participants as to "fix" the underfunding over time. Of course, this assumes Tier II is not challenged at some point for possibly violating the minimum benefit requirements of the IRS for plans that keep participants out of the Social Security system.

5. A Constitutional Amendment proposal will appear on the 2020 ballot to change the Illinois income tax from a flat rate to a graduated rate structure, meaning the tax rate would increase as income increases, just as the federal income tax and most state income taxes do. Expect a bitter fight against this amendment, largely based on concern over future rate increases. Opponents conveniently ignore the fact that the General Assembly has always been able to change the flat tax rates at any time and has done so recently. The real issue is whether all taxpayers should pay the same flat rate or if those with higher incomes should pay higher rates.
6. The Chicago Tribune, among many critics, blames high taxes for the "exodus" of residents from Illinois. In turn, high taxes are caused primarily by state employee pensions. Therefore, if you are concerned about population loss, you need to support pension "reform." The latest Tribune in-depth analysis of the exodus provides a more nuanced view.
7. A Tier III still lurks in the background as HB 1625 and the identical HB 2279. The bill has been in the Rules Committee since March, and that's often where bills go to die. This version of a Tier III would be a voluntary switch for employees under Tier I and Tier II. My limited understanding of the plan gives me no sense of any appeal for Tier I participants, though it might offer an advantage for Tier II. If this bill ever goes anywhere, I'll be sure to provide information.

Anyone interested in reading the articles linked above, but unable to reach the sites, is welcome to email me for a PDF. You may also benefit from the following piece by noted benefits-champion Glen Brown: <https://teacherpoetmusicianglenbrown.blogspot.com/2019/07/a-response-to-crains-forum-for-more.html>.

As always, be sure to read Mini-Briefings and other materials sent from the SUAA office. I try not to repeat that information unless it is particularly noteworthy.

NIUAA Trips and Event Schedule 2019 - 2020

Organized Steven Johnson, Culture and Travel Committee Chair

Upcoming Events

Nov. 13:	"Hamilton", Matinee, Chicago
Nov. 19 - Dec. 20:	Amazon River Cruise
Nov. 30:	Chicago Shopping/ Museum Day \$20.19
Dec. 28:	"Phantom of the Opera", Matinee

2020 Events

Jan. 5 - 14:	Polar Vortex Escape Cruise
Feb. 16 - 22:	Pre-Mardi Gras New Orleans Value Trip
Feb. 16 - Apr. 5:	African Safari (South Africa & Victoria Falls)
March 16 - Apr. 5:	Circle Hawaii Cruise
April 8:	"My Fair Lady", Matinee, Chicago
June 25 - July 5:	Oberammergau and the Best of Germany



Where in the world is Steven?

SUAA Board of Directors

By Steve Cunningham, District Representative

I am pleased to be back in Illinois much of the time and especially to have the opportunity to work again with the NIU SUAA Chapter and the Statewide organization related to our SURS retirement and State benefit plans. As a retiree, it is certainly an honor to be a member of the new SUAA Board of Directors, and we have had two meetings to date. In preparation for the Board of Delegates meeting on November 5 at ISU, the Board has prepared the annual legislative platform and other information, including the 2020 budget, for consideration at the November 5 meeting.

Throughout my experiences working with the SUAA and SURS benefit plans dating back to the early 1990s, when the higher education coalition supported the updated Tier 1 plan, the SUAA has always been indispensable in advocating and supporting member retirement and insurance benefits. The SUAA is the only organization that promotes retirement benefit security for all SURS-eligible personnel employed and retired in Illinois higher education (129,013) including our (66,169) annuitants. Given the funding situation in Illinois, we will continue to face many challenges with respect to public and legislative support for our earned retirement benefits along with the continuation and improvement of future benefits. Accordingly, the role of your SUAA is critical, and we will be working to enhance participation and membership and to strengthen the SUAA organization in order to continue its record of effective advocacy for SURS participants and annuitants. In my experience, the NIU SUAA chapter has been especially well organized as a regional leader supporting the SUAA mission and legislative priorities, and I look forward to working with you in the year ahead.

State Universities Annuitants Association (SUAA)

Foundation Purposes

- Support SUAA chapters establishing Survivor Assistance Programs.
- Provide education and dissemination of information regarding issues affecting the welfare of SUAA members.
- Provide assistance to SUAA members who need financial support through an Emergency Assistance Program.
- Provide a Scholarship Program to support SUAA members, their spouses, children, or grandchildren enrolled in post High School programs.
- For further information on the SUAA Foundation Mission, please contact:
SUAA Foundation, 217 East Monroe St.
Suite 100, Springfield, IL 62701
217-523-4004, suaa@suaa.org.

Survivor Assistance Information for State University Retirement System (SURS) Members

The following documents should be on file in the SURS office ASAP.

- Updated Beneficiary Form with current addresses
- Annuitant's Birth Certificate
- Survivor's Birth Certificate
- Marriage Certificate or Divorce

- Power of Attorney, Adoption, and Guardianship Papers

When a SURS participant dies: Promptly notify SURS Retirement System 1-800-275-7877 or www.surs.org. If the person is currently employed, contact the campus Human Resources Office. SURS will send you necessary forms and information to ensure that survivors receive correct benefits and do not lose health insurance, if applicable.

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.

To be considered for an SUAA Foundation Scholarship, please complete and submit the signed SUAA Membership Certification Form, the SUAA Foundation Scholarship Application, an essay, and 2 letters of recommendations.

Mail to Foundation, ATTN: Foundation Scholarship Committee. Incomplete applications will not be considered. Review of applications will begin on June 1, 2020.

Download application documents and scholarship guidelines: [Foundation Scholarship Application Materials](#)

Andy Small
Representative
SUAA Foundation

Annuitant Association Scholarship Fund Update

By Norden Gilbert, Scholarship Committee

Last spring the Association's endowed scholarship was funded in the amount of \$50,000, due to the generosity of many members' donations. The first scholarship was awarded this fall in the amount of \$2,000. The recipient, Ariana Powell, is a Business Administration major. The scholarship is rotated each year among the colleges. The scholarship for the 2020-21 academic year will be granted to a student in the College of Education.

The Scholarship Committee hopes that the endowment will continue to grow so that additional scholarships of greater amounts can be awarded in future years. Annuitants are reminded that gifts to the fund are tax deductible and are always welcome. Donations will be added to the endowment to increase future earnings. The earnings accrued in just the first three months of the fund were \$843.21. If you are interested in making a donation, a foundation gift form can be found at https://www.niu.edu/annuitants/_pdf/annuitant-association-scholarship-donate-form.pdf.

In Memoriam

Jack Bennett	Mary Lowe
Robert Besonen	Gelina Nunn
Mary Cahill	George O'Connor
Clifford Chaffee	Richard Peterson
Sanford Dean	Margery Resser
Louise Dieterle	Robert Rodine
Paul Eaton	Averil Schreiber
M. Lucille Fink	Gladys Simon
David Hamilton	Jacob Skala
Marian Hector	Miluse Soudek
Arvene Herrmann	Corinne Sulaver
Elaine Johansen	Dewayne Triplett
Romualdas	Reva Ulrich
Kasuba	Estelle Zellen

Dealing with the Loss of a Loved One

By Toni Tollerud, Benefits Committee

Losing a loved one is one of the most difficult and stressful events we will face in life. It can often cause many raw and uncontrollable feelings to emerge such as anger, fear, denial, sadness, shock, or despair. While this challenges us in many ways emotionally, we also need to handle overwhelming responsibilities regarding whom to contact, paperwork, and legal documents.

To assist NIU Annuitant members and their loved ones and families, the Annuitant's Board has created a team of volunteers who can be contacted to help you with taking steps around an impending loss or following a loss. This team, called the Survivor Assistance Team, is composed of trained professionals who can temporarily assist you with what you might need to move forward, especially with notifying agencies and filing paper work. Each member will listen to you and offer you support, compassion, resources, and help.

To make a contact, simply refer to the list below. Contacts can be made via emails or phone numbers. A team member will get back to you as quickly as possible to set up a time to speak or meet with you. You may want to pass this information along to a family member as well. Feel free to contact anyone below with questions, comments, or needs.

Toni R. Tollerud

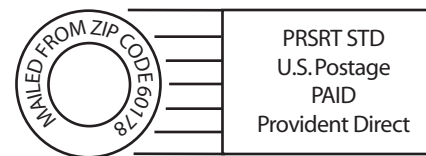
Toni retired from NIU after 27 years of service as a Counselor Educator and two years as the Faculty/SPS Advisor. You can contact her at 815-501-4784 or email her at tollerud@niu.edu.

Deborah Haliczzer

Debbie is a social worker, who served as Assistant Vice President in Human Resources, directing the NIU Employee Assistance Program and employee training and professional education during her 25 years at NIU. She also served as President of the Supportive Professional Staff Council. You can contact her at dhhaliczzer@gmail.com or at 815-793-1487.

LeRoy Mitchell

LeRoy came to NIU in 1971 and became director of the CHANCE program in 1981, where he affected thousands of lives. He is one of the founders of the New Hope Missionary Baptist Church, where he remains a co-pastor. You can contact him at lmitchell@niu.edu.



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