

**November 2008**

## President's Report

Early in May the NIU Alumni Association and NIUAA cosponsored a reception at the Governor's Mansion in Springfield for those members of the General Assembly who are NIU alumni. Several members of NIUAA were in attendance at the reception where they had the opportunity to discuss their concerns one-on-one with the assembled legislators. I believe this was a worthwhile effort and a major step in NIUAA's efforts to become more politically active.

In May NIUAA conducted an e-mail straw poll of its members living in Illinois asking, "Given what you know now, would you support the convening of a Constitutional Convention?". Of the approximately 600 e-mails sent, NIUAA received 194 replies. The vote distribution was 12 votes in favor of holding a constitutional convention and 182 against. These results are similar to the results obtained at SIU-Carbondale, SIU-Edwardsville, EIU, WIU, and 10 community colleges. Data were not available for UI or UIC. Further, at the SUAA Annual Meeting held in Springfield June 17-18, 2008, the assembled membership voted to oppose the convening of a Constitutional Convention.

**SURS Performance:** At the SUAA Annual Meeting Dan Slack, Executive Director of State Universities Retirement System, presented information relating to SURS financial condition. The good news is that our pensions are funded for FY 2009. However, the General Assembly has not addressed how to reduce the long-term pension funding deficit. As of April 30, 2008, SURS Investment Performance was: Month end, 3.4% return; Fiscal year to date, 0.0% (no, this is not a typo); 1 year, 1.2%; 3 years, 10.9%; 5 years, 12.5%; and 10 years, 6.7% . SURS Investment Performance is better than the Benchmark and Public Funds Index to which it is compared.

Also, at the Annual Meeting in Springfield Alan Voelker was reelected to another 2 year term on the Executive Board. I would note that Alan's previous service on the Executive Board was recognized by those voting, since he received the largest number of votes of any of the candidates.



Here is a tidbit to bring you up to date if you missed this year's annual meeting of NIUAA. NIUAA presented to President John Peters a check in the amount of \$5,000.00 for the Forward, Together Forward (February 14) Scholarship Fund. If you missed this year's annual meeting plan to attend next year (June 2, 2009). If you have any concerns, comments, questions, etc. about NIUAA, contact one of the officers or board members.

Check out the NIUAA web site for "Library Information for Retirees" (click on the Benefits tab and look under Library). There is a downloadable form entitled "RETIREE NIU LIBRARIES Access Form" that, when filled out and submitted, will insure Library access if you are connected to Groupwise.

NIUAA's fiscal year runs from July 1 to June 30. Why not make two belated fiscal year resolutions? First, contact Lee Ann Henry (lhenry@niu.edu) and sign up for the dues deduct option of paying your NIUAA dues if you have not already done so and second, be sure that NIUAA has your current e-mail address. See you at the holiday party.

Joe Vaughn  
NIUAA President

## NIUAA Holiday Party 2008

The annual Holiday Party will take place on Wednesday, December 3, 2008, in the Duke Ellington Ballroom at Holmes Student Center. The social hour will begin at 11 a.m. with two cash bars, and plenty of good conversation!



The buffet luncheon will begin at noon and will include beef, fish, chicken, wild rice blend, three veggies, two salads (1 veggie and 1 fruit), rolls & butter, assorted desserts (including some that are **sugar free**), and coffee, tea or lemonade. The cost will be \$20 per person (members and guests).

Our committee is assessing and exploring ways to help people with mobility issues to get to and from the HSC in a cost-effective way. **Be sure to read your invitation VERY carefully.** The invitations will go out in early November. Be sure to get your registration and check to us by one week ahead of the dinner, or you will be assessed 20% additional amount in accord with the HSC rules.

We hope to see you there.

Marge Rey, Co-chair of the Holiday Party

## Benefits Choice

The American Federation of State, County and Municipal Employees (AFSCME) and the State of Illinois have reached agreement on a new four-year (July 1, 2008-June 30, 2012) contract for our health insurance.

Debra Haliczzer, Director Employee Relations Human Resource Services, has informed NIUAA that Benefits Choice Period Two will be from October 27 to November 14. All changes made during this period will be effective January 1, 2009.

According to Debra, "Booklets will be mailed to each member's (all employees and annuitants on State health insurance) home address prior to October 27.



## Pre-Retirement Seminar

For those members of NIUAA who are current employees and are considering retirement this year's all-day Pre-Retirement Seminar will be Wednesday, November 5, 2008.

## Flu Shots

Annuitants on state health insurance can get free flu shots, but if you are on Medicare, you must show your Medicare Card in order to get the shot. People attending the campus flu clinic, or other Health Department flu clinics, should present their insurance cards to the Health Department staff. The dates for on-campus flu shots are Wednesday, October 8, 10 am-2pm and Thursday, November 13, 2-4pm in the Holmes Student Center Ballroom and Capitol Room.



The NIUAA Board presents President Peters a check for the February 14 Scholarship Fund.

## Advice: Vote No On Con Con

by Irene Rubin

The vote to hold a constitutional convention in Illinois is coming up this November. If three fifths of those voting on the proposal or a simple majority of those voting in the election (whether they vote on the con con referendum or not) vote approval, a constitutional convention will be held. There is no way to limit what such a convention might consider, anything from minor changes to altering the state tax system, to rewriting the entire constitution from scratch.

If a convention is called, the delegates could recommend removal of the clause that protects retirees from having their benefits reduced. This is not some abstract concern, as the governor has tried and would dearly love to reduce the annual three percent inflation increase that employees paid for for many years (we put in all our share, the state has failed to put in its share). The constitutional constraint has held back the governor's hand. The surest way to maintain the constitutional protections for retiree benefits is to vote against the constitutional convention this fall. Groups on both sides of the aisle are arguing for and against a con-con, so it can be difficult to cut through the rhetoric. The League of Women Voters, a respected non partisan good government group, having sorted through all the arguments, has determined that the con con is not good for Illinois right now. They have recommended that their members argue against it. They have suggested the following arguments:

1) Cost estimates for a convention are in the range of 75 million dollars—at a time when the state is experiencing severe financial problems and simply does not have the money.

2) Despite claims from advocates of various amendments, a convention is not likely to bring about new solutions from the grass roots, as the convention will be controlled by the legislature (by law.) Special interests could control the convention and hence delegates to the convention would not represent interests of regular voters. " We are concerned that the current political dysfunction in state government will extend to the convention itself," warns the League webpage.

Other reasons that League members gave for opposing a constitutional convention at this time included the risk of exposing the entire constitution to revision and the loss of 1970 gains. They also argue there is a process for amending the constitution which does not require a constitutional convention. The amendment process has been relatively successful since the 1970 Constitution was adopted, with 10 out of 17 proposed amendments

being approved by the voters (3 of the defeated ones were the same proposal). One of these, the Cut Back Amendment, was accomplished by citizen initiative.

If you would like more background on the con con, or on possible arguments, please write to me.

## Special Events

by Steven A. Johnson

The NIUAA hosts several events and trips throughout the year for the membership. The opportunity to socialize with other members is very important, especially for members who have already retired and are separated from the NIU campus.

Coffee hours at local bookstores provide this opportunity several times each year. The latest one was on September 8 and was a 'welcome back to fall' coffee hour. NIUAA thanks the NIU Credit Union for its support by providing coffee and refreshments.

Other activities include 'A Night at the Opera' at the Lyric Opera of Chicago that includes transportation from DeKalb, dinner before the opera, pre and post-opera comments. The next trip is December 9 for Porgy and Bess. Reservations are due by November 9. The last trip in the series is on January 24 and features 'Madame Butterfly'.

Plans for the spring include another coffee hour and perhaps trips to the Chicago Botanical Gardens, Nauvoo, Printers Row bookfare, and a concert on the worlds' largest Wurlitzer Theater organ in Barrington. Suggestions are always welcome and members are invited to become part of the special events committee to help organize and plan future coffee hours and trips. Contact Steven Johnson at [sjohnso11@niu.edu](mailto:sjohnso11@niu.edu).

## NIU OneCard

NIU retirees can get a redesigned NIU OneCard. The OneCard office is located on the lower level of the Holmes Student Center across from the Student Bookstore and adjacent to the TCF Bank. Office hours are 8:15 a.m.– 4:30 p.m. Monday to Friday. In addition to serving as your NIU libraries card, your OneCard allows you, among other things, to use the rec-center at no charge and to purchase certain items from the campus Bookstore at a 10% discount. Your older NIU OneCard will continue to be fully operational; however, the redesigned card contains less encoded personal information (no social security number). To avoid unnecessary delays and or lines at the OneCard Office please call (815) 753-9569 before arriving at the office.

## NIUAA Annual Meeting, June 4, 2008

President Joe Vaughn called the meeting to order and welcomed all of those present. He thanked the membership for its prompt and overwhelming response, following the tragic event of February 14, to the NIUAA e-mail call for volunteers for the Family Assistance Center. He also noted that NIUAA cosponsored, along with the Alumni Association, a reception at the Governor's Mansion in Springfield for those members of the General Assembly who are NIU alumni.

Approval of the Agenda: President Joe Vaughn submitted the agenda for approval. A motion to approve the agenda was made, seconded, and passed.

Approval of the Minutes: President Joe Vaughn requested that if there were no objections to the minutes of the Annual Meeting of June 6, 2007, a motion to approve the minutes be made. A motion to approve the minutes was made, seconded, and passed.

Treasurer's Report: Treasurer John Engstrom provided a written report for the membership. John's report showed that the balance in the checking account and the two CD's totaled \$16,903.34 as of June 4, 2008. The year-end, June 30, 2008, Auditor's Report will be published in the October 2008 issue of the NIUAA Annuitant.

Membership Report: Membership Chair Gary Gresholdt reported that we currently have 1772 members, an increase of 32 over last year. He encouraged individuals to join the Annuitants Association directly through NIUAA rather than through the state office.

Public Relations/Events Report: Chair Steven Johnson noted upcoming events such as the Printer's Row Book Fair and a fall color cruise. He reminded the group that the scheduled events for members of NIUAA are posted on our web page as well as being announced in The NIU Annuitant. He solicited ideas for other events from the membership.

SUAAAction Committee Report: Chair Irene Rubin reminded the assembled members of NIUAA that SUAAAction, the political action committee for SUAA, is supported by voluntary contributions and not from members' dues. SUAA is our lobbying group, but SUAA can not donate money to candidates on behalf of the association. SUAAAction as a political action committee can and does donate money to political candidates. To date about 500 members of NIUAA have donated over \$17,000 to SUAAAction. Funds have been used for mailings and surveys to our members, to send members to fundraisers, and in the past to attend lobby day in Springfield. It is necessary that we support those

candidates for political office who are supportive of issues that are important to retirees such as health care and pension funding.

Change to NIUAA By-laws: President Joe Vaughn presented an amendment to the NIUAA By-laws proposed by the Board to make official the practice that a member's e-mail and postal address will not be shared with third parties and will be used only to inform members of retirement and pension issues. A motion to approve the amendment was made and seconded. The motion passed on a voice vote.

Presentation of Appreciation Award: Gary Gresholdt, Chair of the Awards Committee, stated that the Board had unanimously accepted his Committee's recommendation of the individual to receive this year's award for significant contributions of leadership or service to NIUAA. Gresholdt presented this award to Jay Monteiro for his assistance in arranging for the production and distribution of our new brochure.

Recognition of Outgoing Officers and Directors: President Joe Vaughn recognized the following officers for their hard work during the past year: Vice President Linda Schwarz, Treasurer John Engstrom, Past President Bob Rosemier, and Secretary Pat Sauter (resigned during the year due to health issues). He noted that Directors Scott Banish and Jerry Halverson will be leaving the Board after the completion of one and two terms of service respectively. Directors Joe Koch, Gary Gresholdt, Bob Wheeler, Marjorie Rey, and Pamela Farris were thanked for their service. He also recognized the chairs of individual committees: Steven Johnson, Irene Rubin, Bennetta Stearnes and Charlie Larson. Alan Voelker's service as a member of the statewide SUAAAction Committee was noted as was Lee Ann Henry's outstanding service as NIUAA's University Liaison.

Election of Officers and Board: Outgoing board member Jerry Halverson, who served as chair of the Nominating Committee, presented the following slate of candidates:

### Officers

President:	Joe Vaughn (one-year term)
Vice President:	Linda Schwarz (one-year term)
Treasurer:	John Engstrom (one-year term)
Secretary:	Christine Welch (one-year term)

### Directors

Gary Gresholdt	(second two-year term)
Joe Koch	(second two-year term)
Jerry Meyer	(first two-year term)
Bennetta Stearnes	(first two-year term)

There were no additional nominations from the floor. A motion to accept the report of the Nominating committee was made, seconded, and passed.

Comment from the Floor: Stacey Dolby asked to be recognized to state his concerns that although NIU has a substantial number of minority active employees and retirees, only a small number of minorities participate in the Board and in NIUAA activities. President Joe Vaughn noted Mr. Dolby's concerns and said the Board would consider them.

Special NIUAA Presentation to President John G. Peters: On behalf of the NIUAA Board and membership, President Joe Vaughn read a Resolution adopted by the Northern Illinois University Annuitants Association regarding the leadership and support provided by Northern Illinois University in response to the tragic events of February 14. Joe Vaughn presented President John Peters with a check in the amount of \$5,000.00 for the February 14 (Forward, Together Forward) Scholarship Fund. Please see the photo on page 2.

Reflections of the Past Year at NIU by President John Peters: President Peters thanked the Annuitants Association for their contribution to the Scholarship Fund. As of today more than 1400 individuals and groups have contributed to the February 14 Scholarship Fund. With the NIUAA contribution more than \$468,000 has been contributed to the fund. The first scholarships will be awarded in the near future.

President Peters noted that this year NIU awarded 2500 undergraduate degrees and more than 700 graduate degrees. He praised this generation for their social conscience, compassion, and resiliency in dealing with the events of February 14.

Thanks to well trained professionals, NIU responded excellently to the event of February 14. President Peters cited the tremendous response of the of the greater DeKalb-Sycamore area, from the First Responders to citizens baking cookies.

President Peters thanked State Senator Burzynski and Representative Pritchard for their support generally and in response to the events of February 14.

President Peters said that while this has been a most difficult year for NIU, the future is bright. NIU is developing a Strategic Plan to improve our success rate and to develop clusters of research to serve the region better. Great teaching and research are taking place here, and we have become involved with our proton cancer therapy research project in the DuPage Tech Park. Northwestern University will provide the physicians for this project.

In closing, President Peters reminded the audience "You know where I am if you need me."

#### Legislative Recap:

Senator Brad Burzynski encouraged us to become involved in the political process. He was pleased that we had several members in attendance at the reception for the NIU alumni who are state legislators. He expressed the hope that this event will grow in the future.

The budget passed at the end of May has a \$2.7 billion shortfall. This shortfall is compounded due to a \$759 million shortfall in this fiscal year's budget and unpaid Medicaid bills of \$1.2 billion. Thus the total budget deficit is about \$4.7 billion.

The good news is that our pensions are funded for this year; however, nothing has been done to pay down the pension debt.

Representative Bob Pritchard looks forward to continuing to work with us, and he encouraged us to work with and talk to our friends in other areas of the state to come up with new ideas and better solutions to common problems. He also stressed the need for NIUAA to continue to be involved in the political process.

A Progress Update of the NIU Foundation: Mallory Simpson, President of the NIU Foundation, thanked the membership for its support and for the collective gift to the February 14 Scholarship Fund. Of the \$120 million raised toward a goal of \$150 million for the True North campaign, annuitants have contributed more than \$586,000. Donors are increasingly dedicating their endowment dollars to scholarship support and to faculty support.

SURS report: SURS is sound, but the unfunded liability problem remains. Steve Cunningham, Associate Vice President, Administrative Services, complimented SURS Executive Director, Dan Slack, on the sound SURS fundamentals. Among the Illinois pension systems, SURS has the lowest administrative costs and provides among the highest rate-of-return on investments. The unfunded liability is solely related to the State of Illinois' historic failure to appropriate the State's share of pension contributions over many years. SURS accounts for only 4.1% of Illinois' unfunded pension liabilities, yet accounts for 24% of the participants. Cunningham cited the problem of the looming Constitutional Convention and complimented Irene Rubin on both her report and newsletter articles.

Benefit Choice Changes: Dennis DaVito, Human Resources Benefits Manager, reported that there was still an impasse on negotiations for health care carriers. There will be a benefits choice period, but we do not know when. You will receive another benefits choice booklet, and HRS will make sure everyone is informed. There will be a slight reduction in life insurance premiums.

The meeting was adjourned at 5:05 p.m.

## SUAA Steps Up Lobbying Effort

by Alan Voelker

Since the initiation of SUAA, the state office, the chapters and individual members have conducted extensive lobbying activities with the legislature and other governmental agencies. While SUAA cannot take full credit for all the benefits that have accrued to members since its inception, the association and its members can certainly be proud of the results of their efforts to enhance and to protect retiree and employee benefits. SUAA and its partners have been very successful in looking out for the benefits of its members and all the other members of SURS.

As the assaults on benefits increased in recent years, it became obvious that the constraints placed on SUAA's lobbying efforts by its tax exempt status limited the extent of its influence. Many means of getting our message to the legislators and other policy makers were not possible because SUAA could not use member dues to engage in activities such as attending fund raisers or to make contributions to incumbents or candidates who were in tune with, and were supportive of, the concerns of retirees.

Thus, many members of SUAA and SURS members stepped forward and made voluntary contributions to a fund that could pay for political actions not allowed with SUAA funds. These funds, collected by and dispensed by a political action committee, SUAAction, are used to expand the political influence of SUAA.

Many activities are underway to expand SUAA's political influence. To date, the bulk of these efforts have focused on being a major presence during the November, 2008 elections. These efforts are being structured to become the base of an ongoing extension of SUAA's political influence.

Activities underway include analysis of voting records on issues affecting employees and retirees, identifying coalitions that would be good partners, conducting surveys of incumbents and candidates on issues of concern to retirees, identifying members of key legislative committees, identifying supporters of post-secondary education and related issues such as pensions and insurance, and establishing criteria for making contributions to candidate's campaigns.

Election of state senators is taking place in nearly two-thirds of the districts in addition to the election of state representatives. With such a large number of elections this year, and the draw of the presidential election, SUAA is placing much effort on involvement in these campaigns. In addition to what SUAA members might do on their own, SUAA members are now able to attend

fund raisers as official representatives of the association. They are carrying messages about SUAA's concerns to the candidates. In addition, the voluntary contributions of members are being used to make donations to leaders and committee members who are involved with legislation involving pensions and insurance. Other known supporters of SUAA's concerns are also receiving some campaign support from the voluntary contributions, providing they meet the selected criteria. Further, SUAA is joining coalitions that have an interest in supporting the concerns of retirees and future retirees.

Associated with this election focus is the development of a system to have an official SUAA connection with each of the senate districts and the two related representative districts. By the time the election takes place, it is anticipated that there will be an official SUAA designee from a local chapter who will serve as the official liaison to the senators and the representatives from that district. This person will coordinate the distribution of information to the candidates and continue to assume the same role following the election.

SUAA is continuing to evolve a structure for lobbying on behalf of retirees and future retirees. The immediate future will focus on refining the structure established for this election cycle. What is obvious is how important it is to have the power of a grassroots effort led by the activities of strong chapters. SUAA will continue to work on designing a framework that helps inform chapters and chapter members, but nothing can have more influence on our future than the contributions and the actions of our local chapters and our individual members.

## 2008 Financial Report

by Doug Moore

The audit committee has examined the bank statements, the certificates of deposit, and the cash receipts and cash disbursements records for the year ended June 30, 2008. The records were provided by the treasurer of the NIUAA, John Engstrom.

As a result of this examination, it has been determined that the ending cash balance in the checking account on June 30, 2008 was \$2,694.77. This agrees with the Treasurer's balance and the balance per the bank. It has also been determined that the cash receipts of \$8,959.98 and cash disbursements of \$10,082.58 reconciles to the amounts reported by the Treasurer in his report to SUAA for the year ended June 30, 2008. The last items examined were the certificates of deposit. The CDs' balances at June 30, 2008 were \$6,089.15 and \$8,386.82 respectively.

## Membership Report

by Gary Gresholdt

NIUAA membership continues to grow! We now have 1,768 members and continue to add new members as individuals retire and as current employees recognize the importance and benefits of joining our organization prior to their retirement.

At its most recent meeting, the State University Annuitants' Association (SUAA) provided a five-year look at membership.

	FY 03-04	FY 04-05	FY 05-06	FY06-07	FY07-08
NIUAA	1,056	1,347	1,585	1,691	1,772
SUAA Total Membership	11,662	13,056	14,494	14,915	14,761

(SUAA Membership Summary – May 31, 2008)

Membership in NIUAA has increased by nearly 70 percent during this five year period. We are one of only 17 chapters whose membership exceeds 51 percent of its potential membership and are among those chapters annually recognized for their effectiveness in recruiting new members.

Our members have the option of maintaining their membership by having their dues deducted monthly from their annuitant or payroll checks or may make annual direct payment of their dues. Within recent years, we have seen a shift from once-a-year dues direct payment to monthly dues deduct payments. Nearly 70 percent of our members now pay through monthly dues deductions. We encourage monthly dues deduct payment because this method is not only convenient, but also insures there is no lapse in membership.

While the chapter continues to use various available methods to recruit new members, word-of-mouth remains our best recruitment tool. Every member can encourage non-member friends and colleagues to join NIUAA!

## Alumni Association Announces New Membership Opportunities

by Bob Wheeler

NIU annuitants continue to be honorary members of the NIU Alumni Association. Recently the Alumni Association has announced some enhanced membership opportunities. These require payment of annual dues, which will be used to support alumni programming and scholarships. Full details can be found on NIU's website [www.niu.edu](http://www.niu.edu) (click on Alumni Association in the A-Z Index), but here is a summary. The Cardinal & Black membership (\$40 annual dues for one person, \$55 annually for joint membership) offers discounts on NIU merchandise at the Holmes Center Bookstore and the Alumni Shop in the Barsema Alumni & Visitors Center, four issues of the Northern Now magazine each year, discounts on football season tickets, certain Convocation Center events, and other NIU performances, seminars, field trips, and continuing education courses, and even discounted car rentals through Hertz. The Legacy membership (\$250 annual dues for one person, \$300 annually for joint membership) offers these benefits plus an invitation to one President's football pregame reception and two special financial or cultural seminars during the year. You can contact the Alumni Association at (815) 753-1452 if you have questions.

## In Memoriam

Joe Bauxar  
 Marion Benes  
 Louis Bergren  
 Daniel Edwards  
 Gladys Foster  
 Rosamand Gutesha  
 Mary Jacobsen  
 Pamela Klemn  
 Kathryn Kukura  
 Joseph Pecenka  
 Peter Perino  
 Viola Purdy  
 Carmen Pursley  
 James Sheehan  
 Manfred Thullen  
 Joan Toppen  
 Thomas Woodstrup  
 Frank Van Buer



## Update Your New Address!

Please notify NIUAA when your address changes by calling Lee Ann Henry at (815) 753-7406 or, better yet, e-mail her at [annuitants@niu.edu](mailto:annuitants@niu.edu)

# NIUAA 2008-2009 Board Members and Officers

## Officers

President . . . . . Joe Vaughn . . . . . 317 S. 6th St., DeKalb, IL 60115. . . . . (815) 756-7722 . . . . . jvaughn@niu.edu  
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(including The NIU  
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## Holiday Party–Marge Rey

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## Get Involved

If you would like to become more involved in NIUAA, please contact Joe Vaughn. NIUAA is seeking individuals who would be willing to be nominated for membership on the board, or to serve as committee chairs or as committee members. Board members are elected at the annual meeting in June and serve for at least 2 years. There will be 4 board positions (2 faculty positions and 2 staff positions) up for election in June 2009. Members and chairs of committees are not elected but are appointed by the NIUAA Board.

## THE NIU ANNUITANT

Northern Illinois University Foundation

DeKalb, Illinois 60115-2882

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