I’m humbled and honored to lead this university that I love and respect. When I accepted my new role, I pledged that NIU would be guided by the principles of shared governance, mutual respect, and transparency in decision-making. In this spirit, today we will not only celebrate some of the university’s accomplishments— we will also discuss some of the challenges that face us.

Our Board of Trustees has elected to delay the presidential search, but the trustees do not want NIU to delay on advancing important initiatives. I want to be clear that the university will keep moving forward. I believe deeply that the strength of NIU is from the bottom up and not the top down. That means that our best ideas come from staff and faculty—and always have.

In my time here, Program Prioritization best demonstrates the power of bottom-up. Faculty and staff at every level were involved. The transparency of process, insights, and results are impressive. We’re doing more than ever to capture and utilize data to inform our strategies and refine our practices. We have recognized the power of relationships as resources.

And in fact we are taking that last idea and extending it beyond the campus. A few examples:

- There is a new, county-wide transportation plan online for public review and comment. If approved, it will integrate the NIU Huskie Line bus system and the community’s TransVAC transportation service into a shared service delivery system. Over the next few years, routes will be expanded, the frequency of certain stops will be increased, money will be saved – and we will have jointly expanded opportunity and quality of life for students and local residents alike.

- Another example is an initiative called the City/University Student Leaders Group. Driven by a desire to better connect students with their host community, we worked with the City of DeKalb to recruit a diverse group of students who provide regular input on issues related to economic development and neighborhood revitalization.

- NIU is also doing more to engage our nearly 7,000 alumni who live and work in the DeKalb/Sycamore area. Our goals are to better mobilize their vociferous support of NIU, to enhance their participation in volunteer opportunities, and to increase their attendance at lectures, athletics, and arts events. To this end, we’re launching an event series called the “Taste of NIU,” which aims to drive alums to campus for special experiences.

Soon, visiting alumni will experience lecture and performance venues that have been recently updated and improved. We are closer than ever to having an inspiring and useful space for the Department of Anthropology and the School of Theatre and Dance. Next year, the Stevens Building will open with new classroom space and a “black box” theater.

We are also on schedule to start revitalization of the ground floor of the Holmes Student Center. Paid for by Build America Bonds, this project will result in a completely new space by 2019. The renovation plan has been informed by input and ideas from NIU students as well as from staff members. The planned $20 million renovation will include new dining, retail, entertainment, and lounging options.

Many of the opportunities and accomplishments that I have cited for celebration are things that support student recruitment and retention, and the good news is that campus visits are up, as is freshman enrollment, law school
enrollment, and overall retention. We have to build on those gains. We can do this using the lessons we have learned about the importance of collaboration and the power of relationships as resources.

I’m particularly proud that this summer, NIU along with our partners—Township High School District 211 Palatine/Schaumburg and Harper College—were selected as one of four teams out of 50 that applied to participate in an intensive challenge funded by the Michael & Susan Dell Foundation. The goal of the award is for two- and four-year institutions to partner on a solution to increase the number of community college students earning four-year degrees within six years. We will spend the next 15 months working together to design and build truly seamless transfer pathways. Pilot programs will be launched in fall 2018.

Our progress as a university is exciting, but as we move forward, we cannot forget who we are. We have to invest in what makes NIU special—our mission, our core values, and our unwavering commitments to excellence and to diversity and inclusion. At NIU we continue to address complex, real-world challenges with interdisciplinary, forward-thinking research in a wide variety of fields. In FY17, NIU faculty members attracted nearly $10 million in funding for fundamental and applied research.

NIU research helps to educate and prepare our students for 21st century careers at the same time that it benefits our region and advances our society. Our academic programs are being recognized in national rankings for their exceptional quality. And here’s one ranking that truly distinguishes NIU among Illinois public universities: Our excellence in academics and research were nationally recognized recently by a Brookings Institute Report where NIU was named as being among a select group of the nation’s public universities that simultaneously produce important research and advance the social mobility of students from low-income households. The work of NIU faculty and staff is not only informing our society, but also transforming the lives of our students and their families.

Our students are often inspiring—because of their hopes and dreams, their motivations and their accomplishments—but they are also vulnerable and in need of our respect and our support, especially students of color. No matter what your background ... whether you are Black, Latino, Asian-American, white or an international student ... or have a different belief system ... regardless of gender identity or status ... when we admit you to NIU, we accept you, and we welcome you. To our undocumented students, we sent a firm message that we stand with you—you belong here. To our LGBTQIA students, we support all gender identities. We also value our Asian-American students and recognize that they need a new space for their Resource Center.

What oftentimes stands in the way of getting things done how and when we want to is our lack of financial resources. And in fact, our fiscal situation remains NIU’s No. 1 challenge. The impacts of more than 700 days without support from the state cannot be undone quickly. Fallout is widespread, and there’s still a great deal of uncertainty with Springfield for next year. We have parts of our budget that deserve, but don’t have, stable, permanent funding. We have pressing needs related to renovation and repair of our physical plant and refresh of our technology. To address these imperatives, we are going to have to continue to reduce spending in some areas while we also increase revenues.

But despite our budget difficulties, we cannot afford to neglect our most important resource—our people—any longer. I’ve asked our Board of Trustees to convene a special board meeting on October 19, when we will request an increment program based upon 3 percent increase for all eligible employees. Here are some of the highlights:

• We’re targeting implementation so that all eligible employees should see an impact in their paychecks by mid-December.

• All graduate students are considered eligible employees and will receive a 3 percent increase in their stipends.

• Finally, I have elected not to take the 3 percent. Our vice presidents also want to be supportive, and each is either electing not to take the raise or to make a gift to the NIU Foundation.

We wish we could do more—but it is a start. Ultimately, we need a longer-term strategy designed to address merit for faculty and other employment classifications, as well as issues such as compensation, inversion, and market equity.

Investment in people is a priority for me. To be successful, we must invest in our faculty, our staff and our students. And NIU is 18,000 students strong! Who are our students? They originate from more than 100 countries with unique cultures and perspectives. They are first-generation students blazing paths that will change their family’s trajectory. They are transfers from community colleges. They are adults working to finish degrees or to achieve new ones. They are legacy students whose parents or siblings are Huskies. And I’m especially proud when I say that, for many of you, they are your sons and daughters.
I am also proud to say that our NIU students are leaders. They embrace the values of the Northern Pact. And they look out for each other. We see this in the priorities of the NIU Student Association—its commitment to supporting undocumented students, and its inspiring #noshame campaign, focused on de-stigmatizing mental health issues. We also hear this in the amazing stories that our students share about their struggles and triumphs.

In this context, I want to share something personal with you. My husband, Doug Rose, and I have been so moved by our students and their stories that we have decided to make a $25,000 gift to the NIU Foundation this year for student scholarships. We believe in the potential of our current—and our future—students. Our hope in making this gift public is that others will join us, to increase the unrestricted funds available for scholarships, to make education a reality for those who want it most. I want to end today on three words. This has become a battle cry for Athletics, but these words really speak to all of us.

Smart. Tough. Relentless.

These adjectives not only encompass who we are, but how we deliver in the pursuit of our mission. How we deliver for our students. You each make a difference at NIU. We’re stronger for that, and I’m grateful. Thank you.

Go Huskies!

NIUAA President’s Report

We operate the NIU Annuitants Association (NIUAA) on $3 per person per year. We need your help to continue doing that. Our main purpose is to protect members’ health care and pension benefits. That is the reason that the State University Annuitants Association (SUAA) gets to keep most of our dues money, $33 of every $36 membership each year. How have we run an organization on $3 per member each year? NIUAA was able to do this because NIU gave us generous in-kind and cash support.

We have been extremely well-supported by NIU for years. Our chapter had better university sponsorship than many other SUAA Chapters around the State. NIU even paid for our printing and postage, but times have changed. NIU’s student enrollment and State funding have declined, and given NIU’s reduced receipts, it is unable to continue its past high level of generosity.

Clearly we need to look at all our finances closely, especially since we cannot depend on future gifts such as the generous donation the Operating Staff Council gave to the Annuitants Association in 2016. We do not want to raise dues. Since revenue increases are not promising or attractive, cost reduction is our choice. You can help us reduce one of our largest costs. The newsletters’ printing and postage have become major cost items at between $1 and $2 per newsletter per person. You can make a big difference if you will accept electronic correspondence similar to that sent by places of worship, libraries, charities, government offices, and financial institutions.

Let us email newsletters, invitations, and other information to you. This would help NIUAA and you. Emails are quick and cheap, which allows us to send news and updates as-needed rather than on a twice-per-year schedule. Paperless newsletters also help protect the environment.

Go paperless! Send your email address to annuitantsassoc@niu.edu.

We plan to offer new information and opportunities to our NIUAA members regularly via email. Three items are described here that they were emailed earlier this year, a recap for those members who do not yet correspond with the Annuitants Association electronically. Material reviewed includes (a) how to access the revised member-access only SUAA website, (b) an outline of the Bereavement Team’s formation and service, and (c) a message about Silver Sneakers—a health and fitness program tailored for mature adults.

How to Access the New SUAA Website

The SUAA web site, revamped by SUAA staff, is now available for SUAA members only. If you did not receive the easy login instructions, here they are:

1. Go to www.suaa.org, the SUAA web site.

2. Enter your username—which is the email address at which you receive SUAA information—in the box on the upper right part of the screen. Use upper- or lower-case letters exactly as your address is. This email address is the one associated with your membership profile in SUAA.

3. Enter your password or, if you don’t have one, follow the instructions to create a password. The site will give prompts to guide you through this process, if needed.
If you have not been receiving emails from SUAA, you may want to check your membership status and information with a call to 815-753-8377 or email annuitantsassoc@niu.edu. After logging in, take a few minutes and explore the site’s tabs with their pulldown menus. For example, the News tab’s pulldown menu includes Annual Meeting Speaker Videos. One of the clips, “Income Tax on Pensions,” is a presentation by our Past President, Joe Grush.

**Bereavement Team**

A small group of NIUAA board members—Debbie Haliczer, Leroy Mitchell, and Toni Tollerud—want to offer their service to annuitants or their family members who have lost a NIU loved-one. Many times people need help to cope with filing forms, notifying agencies, and meeting with NIU Human Resources about benefits and options. This can certainly be a difficult and challenging time. If you would like someone to talk to or help walk with you through this process, they are willing to provide help. Please feel free to contact them. Some information about each of them follows:

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 or tonitollerud@gmail.com.

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 or 815-756-6750.

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 dhhaliczer@gmail.com or at 815-793-1487.

**Silver Sneakers**

The Silver Sneakers program could be attractive for people who want to be physically active and support good health through a fitness center or gym activities. This program is available in Illinois and in many other States. A gym membership through Silver Sneakers may be available to you at little or no additional cost if you have Medicare Advantage—Medicare Part C. Illinois is the home state for most of our members, and Illinois supports this program. As an example, four fitness locations in the City of DeKalb offer this service.

Several services are included for participants at any Silver Sneakers location. Silver Sneakers folks receive all benefits that are part of the gym’s basic level access or membership. Each location has an advisor to introduce you to this program and to help you begin. From time to time, health education-related seminar invitations and other health-related events are offered. For more information about the Silver Sneakers program services and benefits, go to: https://www.ehealthmedicare.com/faq-what-is-silversneakers/

Not all Medicare Advantage plans, Medicare Part C, are the same as other plans. Although Illinois supports Silver Sneakers, not all the U.S. States do. Check to see if you are eligible for Silver Sneakers at: https://tools.silversneakers.com/Eligibility/HealthPlans

Many fitness centers and gyms are Silver Sneakers program locations. You can learn about the places that offer this service near you at: https://tools.silversneakers.com/LocationSearch

**Continued NIUAA Committee Work**

The NIUAA Board Committees have worked steadily for our good. The Travel committees’ reports and the Social committee’s Holiday Luncheon invitation are part of this newsletter. I hope to see you at some of those events.

Lynn Neeley
NIUAA President

**Legislative Report**

*by Jim Lockard, Legislative Chair*

There is rarely a dull moment in Illinois politics, especially when the General Assembly and the Governor are deadlocked, as has been the case for most of the last two years. Gov. Rauner swept into office on a promise to shake things up in Springfield with a lengthy agenda that would “solve all the state’s problems.” So far, it appears that most of the shaking up has been of the governor himself. Perhaps he is understanding finally that governing a state is far different from being a CEO. Then again, perhaps his great wealth and hubris will continue to blind him...
to reality. Time will tell, such as in the outcome of the 2018 election. Here are some of the more significant political events and issues in the recent months.

First, Crain’s posted an interesting article several weeks ago in which John Rowe, former CEO and Chairman of huge Exelon Corp, explains why running government is NOT the same as running a business. I will be happy to send an e-copy of this short piece on request (email me at jalockard@gmail.com)

Second, a discouraging note about the Illinois budget. While it’s great to have a budget after the 2-year standoff between the General Assembly and Governor, I saw little media attention to one small piece of the legislation that affects the state pension systems. The years-long struggle to fund the state pension systems more fully remains a huge concern, but the new budget includes a provision that reduces the state’s contribution to the pension systems in FY18 (legally, if unwisely).

Third, efforts to “reform” Illinois’ pension systems have not ended. The problems associated with our grossly underfunded systems have not been solved or even addressed. In fact, some things like the budget provision just noted will make the situation worse. Another is strong interest in creating a new retirement system that resembles the private sector 401(k) plans. SURS has had such a system for many years - the Self-Managed Plan. The problem is that funds for these are not part of the major pool from which SURS pays traditional pensions. This reduces the amount that SURS receives to invest for the benefit of participants in the traditional plan, just as reduced state funding does.

Fourth, Scott Drury, a candidate for governor in our 2018 election, is a strong advocate of offering individuals in the traditional pension systems an option of a buy-out, which would mean giving up one’s lifetime pension for a fixed amount of money in a lump sum, which the individual could then spend or invest as deemed appropriate. (Hmm, I wonder how many would have the discipline to invest the money or the knowledge to do so wisely?) If you are already retired, this wouldn’t apply to you. If you are still working, such an offer could lie in your future, so be alert to developments ahead.

Fifth, the number of veteran politicians who have already resigned (e.g., Christine Radogno, former Senate minority leader), or have announced their intention not to run again, has been termed a “stampede for the exit” by the Illinois Policy Institute. IPI tallies 30 lawmakers so far who will not return next year. Among the latter is strong NIU supporter Bob Pritchard, who voted against the governor on the budget. Details are at: https://www.illinoispolicy.org/illinois-lawmakers-stamped-for-the-exit/.

Finally, Lisa Madigan decided not to run in 2018 for another term as Illinois Attorney General or for any other office in 2018. While her interest in being governor is well-known, so is her (wise) view that she cannot be governor while her father remains Speaker of the House, and for that there is no end in sight.

Benefits of Membership SUAA/NIUAA
by Pat Very, Membership Chair

ALL academic and civil service employees who contribute to the pension system are eligible for NIUAA, not just after retirement. If you are a current member, your investment in NIUAA and SUAA (the state organization), paid the lawyers who successfully pleaded our case before the Illinois Supreme Court to protect our pensions. However, those not retired have the most to lose — still. Numbers speak; the more members of NIUAA, the stronger our voice. We have about 1890 members and are trying hard to get to 2000. Do you have friends who are currently academic and civil service employees? Retirees? Retiree spouses? Survivors of retirees? Ask them if they are members of NIUAA. You are our best recruiters.

As a member, are you getting as much out of your NIUAA Membership as you can? Do you read your newsletter? Significantly, You can receive it by email—which saves us printing and postage costs. Did you attend the Holiday party in December, and the Annual dinner last June? Have you dropped in to the latest Coffee hour? Have you been on one of the trips Steven Johnson of Compass Travel organizes—from Drury Lane to Shakespeare plays to travels to the Rose Bowl and even India and Africa? Do you use your Outlook Retiree Account to access the NIU network? All this for $36/year to be a member, and you can even have $3.00 automatically taken out of your paycheck monthly (or $1.50 biweekly) and not have to worry about renewing. When you retire, be sure to fill out a new form since you will change sources of income. Forms are on our website: http://www.niu.edu/annuitants/membership/index.shtml. If you have questions or to make changes, just email or call Chris Atherton, Human Resource Services, 815-753-8377, annuitantsassoc@niu.edu.

See you at the next coffee!
SURS Report for NIUAA Membership
by John Engstrom, SURS Board Member

I attended a SURS meeting on September 14-15, a regular quarterly meeting. Here are some comments based on that meeting.

- The earnings for FY 2017 were 12.2%. Other earnings numbers are (a) 3 year, 5.0%, (b) 5 year, 8.98%, (c) 7 year, 9.7%, and (d) 25 year, 8.2%. The funding ratio as of 6/30/17 was 42.7%. As of 6/30/16, it was 41.6%. Asset allocation changes during the past year were primarily to reduce risk. As of 6/30/17, $5.1 Billion was invested with (as defined by statute) minority, female, or disability firms, or 28%. As of 6/30/17, 43% of our investments were passive or structured active and 57% were active. At the meeting this week, we approved the FY18 investment plan.

- Our leadership is settled with Martin Noven as CEO and Doug Wesley as CIO. We have a number of staff retirements coming up this year, including our membership services director and our chief financial officer.

- As you have heard, we have a new plan, known as Tier III. This is a hybrid plan with both DB and DC components. The universities will be making partial payments to us. The new plan is very complicated and will commence as soon as the Board says we are ready. The new plan will not affect annuitants or self-managed plan active members. Current active Tier 2 members will have the option to shift to the new Tier III. It should be some time before Tier III is implemented. The new plan will be costly for the pension plans to implement.

- An election will be held next spring for trustee positions. One annuitant trustee and two active trustees will be elected. The election will be held in March-April, 2017. Application materials will be available on October 2, this fall.

I have decided to run for another term and will be circulating petitions to get on the ballot in early October. If anyone else from NIUAA is running for the annuitant position, check the SURS website beginning October 2 for instructions.

NIUAA Trip/Event Schedule
2017-2018

2017 Events

October 10: NIUAA members meeting, BAVC, 5pm
October 11: Trip information session for ICELAND, 3pm, BAVC
October 12: LES MISERABLES, Cadillac Palace, Chicago
October 12: OnStage Alaska, 6pm, FREE, BAVC
October 27: November 3: DANUBE SYMPHONY: Riverboat cruise, Vienna to Munich
December 2: Chicago Shopping trip, $20.17
December 4-8: Branson Holiday Shows (value trip, $545)
December 9-20: Southern Caribbean cruise

2018 Events

January 4-28: ANTARCTICA and South America (Buenos Aires to Santiago)
February 4-10: New Orleans (value trip, $679)
February 19-March 3:
March 16-23: Natchez Pilgrimage tour
March 28: HAMILTON (sold out)
April 12-17: Washington DC (value trip)
June 12-28: Alaska and the Yukon
July 23-27: Stratford Festival of Canada
September: Scotland and Wales (sold out)
September 28: Rocky Montaneer, roundtrip Vancouver
October 21-28: Northern Lights in ICELAND

For Information or Reservations:
Contact Steven Johnson
Culture and Travel Committee chair
815-756-1547 or travelsociety@hotmail.com
Update Your Contact Information!

Please notify NIUAA if your address changes by contacting Chris Atherton at (815) 753-8377 or cpeddle@niu.edu. If Chris does not have your current email address, please forward it to her. Doing so will facilitate faster communication on matters of interest to the members of our chapter.

Although we will continue to send “hard copies” of our newsletter to NIUAA members without email, we can contact you more quickly and less expensively if we have an email address for you. If you do not have an email address, you can get one for free by calling the Service Desk at 815-753-8100 and identifying yourself as a member of NIUAA.

NIU Annuitants Holiday Party 2017
Wednesday, December 6th

11 a.m. Social Hour (cash bar)
12:00 pm Luncheon Buffet

Farandas, 302 Grove Street, DeKalb
Easily accessible, free parking

Buffet items: 2 entrees, Creamed Chicken with dill sauce and Vegetarian Lasagna, vegetables, salad, dinner rolls, cookie platter (with sugar free options)

COST: $25 per person (non-refundable)

You may contact VAC to make arrangements to be picked up at home and delivered to Farandas. You must be registered with VAC and make reservation 6 days in advance. Ask to be picked up for the return trip between 2:00 – 2:15 pm. The phone number for VAC Transport is 815-758-6641.

Please fill out information below and RETURN BY NOV 30th. Make your check payable to NIUAA and mail to NIU Annuitants’ Assn., c/o Margaret Phillips, PO Box 316, Sycamore, IL 60178. For questions call Margaret at 815-895-4329.

Please KEEP this part & return lower part.

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Please PRINT:

Member(s) ____________________________ ____________________________

Non-member guest ____________________________

Member(s) address: ____________________________

__________________________________________

Member(s) phone: ____________________________ Check enclosed for $________
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Please Note: Voting members of the NIUAA Board include all officers and those listed as Directors.