



## Spring 2025 UPI Retirees Chapter Newsletter

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Retirees Chapter Facebook Page: <https://www.facebook.com/UPIRetirees>

Retirees Chapter Webpage: <https://www.upilocal4100.org/retirees>

## Greetings, UPI Retirees!

Here's your Spring 2025 Newsletter, covering activities for the past half year. Before you delve into the informative articles, I have a few new things to note about our chapter.

UPI Retirees is a single, statewide chapter. The Retirees Executive Board includes three officers, retirees representing the different UPI campuses, plus several other positions. Since last fall, we have gained two new board members: Madelyn Anderson, NIU Instructor Representative, and Kerry Ferris, NIU Tenure Track Representative. Kerry is also our new newsletter editor, and we are grateful for that! We hope to find a representative for ISU in the near future. Congratulations to the United Faculty of ISU and the UIS Non-Tenure Track Faculty (new UPI chapters) for obtaining their first contracts this spring!

Steve Frankel, UPI Local Vice President and our chapter's liaison to the local, is preparing for his retirement from NEIU after many years on their faculty and from his UPI position. We thank him for his invaluable service to the local and our chapter. We will miss him as liaison but also look forward to gaining him as a member of the Retirees Chapter!



Betsy Essex

Since the elimination of Retirees dues last August, our membership has been growing rapidly. As UPI members retire, we send them a letter welcoming them to our chapter. Former UPI members who are already retired but not members of our chapter can contact their campus representative on our Executive Board or me if they are interested in joining.

As our membership increases, we need your help to ensure our chapter is relevant and engaged. Send us your ideas for activities and advocacy! To join our lobbying efforts, please contact Audrey Manley, our legislative liaison. To support activities at your university, please contact your campus representative. Your representative is also a good resource for questions about retirement benefits or about our chapter.

See the list above for the names and email addresses of all our Executive Board members and the links to our Facebook and UPI website pages. Let us hear from you!

Cordially,

Elizabeth ("Betsy") Essex  
President, UPI Retirees Chapter

## Tribute to Ellie Sullivan

(Laurie Walter)

Ellie Sullivan (December 17, 1951-April 27, 2025) started her UPI career at Chicago State University, where she was Director of Testing. She was a major player in organizing the Academic Support Professionals and continued to champion their cause throughout her life. But she also enjoyed excellent relations with the faculty and with anyone in the administration who had any sense; all of them

appreciated her patience, her intelligence, and her devotion to the students and the institution (of which she was also an alumna).

Ellie eventually became UPI Local Treasurer and then, when Sue Kaufman retired, UPI Local President and an IFT Vice-President. She had friends throughout the state and the country who knew what a good job she was doing for state universities, for public education, and for the union movement in general. After many years of dedicated service, she elected to spend a well-earned retirement with her beloved husband, Brian, and their children Elinor ("Nell"), Margaret ("Maggie"), and Brian.

Ellie left us quite unexpectedly and we are the poorer for it--but the richer for having known her and worked with her. We will remember her with kindness and love.



Ellie's obituary can be found at:

<https://www.chicagotribune.com/obituaries/elinor-ellie-m-sullivan/>

She will be missed.

## UPI 2025 House of Delegates Meeting

(Susan Meiers)

The 2025 UPI House of Delegates meeting occurred Friday and Saturday, March 28 and 29 at the Chicago Teachers' Union Building in Chicago, IL. Friday's session (3 pm-9 pm) began with two workshops; one on "So You Need to Lobby? Now What?" [In-person meetings with personal stories are most effective] by Nick Yelberton, IFT lobbyist, and the second, "Speaking to Media, Legislators, and Governing Boards: Spokesperson Training," [Stay on message, stay professional, pivot back to message as often as you can] from Amy Excel, IFT Communications. These were followed by the Welcome Reception and the Delegate Dinner in the CTU Ballroom. After dinner, we heard the State of the Union Address from UPI President John Miller and reports by Chapter Presidents. Wall of Fame Awards were given to honorees Nancy Matthews (NEIU), Audrey Edwards (EIU), Elizabeth Essex (GSU), and Steven Frankel (NEIU), pictured here with John Miller. One honoree, Madelyn Anderson (NIU Instructors) could not attend but will receive her award later. They are all retirees except for Steve Frankel, who is retiring soon.



On Saturday, at 9:00 am, each chapter (current employees and retirees from each chapter/university) developed a proposal for an action on campus to address a specific issue (e.g., lack of AC in a particular building on campus, organizing civil service employees), and then planned their action, taking into consideration: the ultimate goal, whom the action was to "pressure," what the hoped-for result of our action would be, what goal did we have for union member turnout, and what our media/public message was. Plans were written on large sheets of paper and shared with the entire House of Delegates. After a break, Sarah Cohen, AFT Lobbyist, depressed/presented us with a summary of actions/intentions the Trump administration has/is/will take against education. Lunch saved the day, and the president of IFT, Dan Montgomery, stopped by to remind us we do Really Good and Important Work and not to get too discouraged. Afterward, Nick Yelberton, IFT Higher Ed Lobbyist, described "All Things Springfield" and what legislation was moving through the General Assembly, how to use the General Assembly website ([www.ilga.gov](http://www.ilga.gov)) to keep track of legislation, reminding us that "Bills may die, but the content may be moved to another bill," and that the legislature is working to "fix" Tier 2 pensions to make them fair and legal. We then heard Officer Reports (Steve Frankel is retiring, our financial condition is rather good, and we are active in all of our chapters), and voted on multiple resolutions. We were dismissed shortly after 3:10 pm.



## **SURS Update**

(Steven Rock)

The SURS Board and Board Committees met on March 6-7 at SURS headquarters in Champaign and the Investment Committee met on April 17 in Chicago.

The Annual Comprehensive Financial Report for the fiscal year ending June 30, 2024 has been posted on the SURS web site ([surs.org](https://surs.org)). It is full of facts, figures, and details about SURS.

For those in the Defined Benefit (DB) Plan, the one-year return for the portfolio as of the end of December 2024 was +7.3%. Taking a longer time horizon, the five-year annualized return was +6.8% and the ten-year return was +7.0%. These all exceeded the annual return goal of +6.5%. As of the end of March 2025, assets totaled about \$24.4 billion, and the funding ratio was 45.6%. The political and economic turmoil over the last three months has caused the DB portfolio to decline. Due to delayed reporting for some investments in the portfolio, the full extent will not be known for a couple of more months. Recognizing the possibility of a substantial market decline, and due to the low funding ratio, the portfolio is invested to provide a substantial degree of downside protection and is performing as expected.

As of the end of December, assets in the Retirement Saving Plan totaled \$4.7 billion. The average account balance was over \$187,000.

The State FY 2025 appropriation of \$2.213 billion is being paid fully and on time. Benefit payments for FY25 are estimated to be \$3.36 billion. The gap is funded by contributions from active employees and investment returns. The required state contribution for FY 2026 is \$2.32 billion.

The SURS Board is considering its investment portfolio composition based on an asset/liability study conducted by our general consultant, Meketa. This is typically done every three to five years. The process will be finalized in June. The goal is to achieve higher returns with less downside risk.

There are several bills introduced in the State legislature that would impact SURS. It is unclear what their chances of passage are. These include changes to Tier 2 to deal with the safe harbor issue (that the pension plan has to be as good as Social Security, which state workers do not participate in) and other enhancements to Tier 2. The Governor's budget proposal suggested that the ramp to get the system better funded extend the date from 2045 to 2048 and increase the funding ratio goal to 100% (from the current goal of 90%).

The Board still has a vacancy for one appointed trustee and awaits action by the Governor. The Board is beginning to develop a strategic plan.

The views expressed are those of Steven Rock and do not necessarily reflect those of SURS.



# UPI Local 4100 Retirees Legislative Report for Spring 2025

(Audrey Manley)

Local 4100 retirees need to be thanked for their support of legislation that affects their benefits and institutions of higher ed. Thank you for the emails, phone calls, letters to newspapers, petition signatures, witness slips, contacts, and contributions to COPE. We did make a difference! We need to continue our support with the help of IFT and especially COPE. Right now, with our government working the way it is, we will continue to work for equity in funding of our state universities, improving Tier 2 pensions, supporting professional librarian faculty, and “Hands Off” gatherings. We will continue to oppose legislation for Bachelor degree programs at community colleges that would undermine state universities. You saw the result of our union work in the Social Security Fairness Act. Your voices are important, so keep using them and continue to support COPE as they work for us!

Members of the Retirees Executive Board have been on the front lines of our legislative endeavors. Pamela Salela and UIS colleagues joined the Fix Tier 2 rally at the Illinois Capitol in November. Kerry Ferris and Nancy Matthews testified in support of equitable higher education funding at the January Illinois Board of Higher Education (IBHE) meeting. Nancy, along with NEIU-UPI colleagues, also supported equitable funding legislation through in-district meetings with four legislators: Senators Ram Villivalam and Laura Fine and Representatives Robin Gabel and Norma Hernandez. Madelyn Anderson was in Springfield in February for NIU advocacy day. Betsy Essex participated in Higher Education Advocacy Day in Springfield on March 18; she and Kerry also lobbied for UPI priorities the following day.

We encourage you to send us accounts and photos of your own involvement in advocacy and lobbying for the UPI Retirees Chapter Facebook page and future newsletters.



UIS-UF Treasurer Eric Hadley-Ives, UIS-UF President Dathan Powell, UIS-UF member Missy Thibodeaux-Thompson and UIS-UF retiree Pamela Salela at the Fix Tier 2 rally.



UPI President John Miller and Retirees Chapter President Betsy Essex, with UFA-NIU Executive Board Member Kristin Huffine and WIU Chapter President Merrill Cole at the Higher Education Advocacy Day.

# 2025 Retirees Annual Meeting Report

(Kerry Ferris)

On Tuesday, April 15, about 40 retirees convened on Zoom for the chapter's annual meeting to learn from a number of guest speakers.



AFT President Randi Weingarten, center back, with President Biden, signing the Social Security Fairness Act.

AFT Assistant Director for Government Relations Megan Stockhausen updated us about the Social Security Fairness Act, which repeals the Windfall Elimination Provision and the Government Pension Offset, which means that public employees will have their Social Security benefits restored. Starting February 25, 2025: SSA began to pay retroactive benefits and is increasing monthly benefit payments to people whose benefits have been affected by the WEP and GPO. This is great news and a win from the outgoing Biden administration.

Unfortunately, the Trump administration and DOGE are engaged in gutting the Social Security Administration itself—closing offices, firing personnel, limiting services, and working with DHS to enforce the administration's anti-immigrant agenda. Threats to SSA from Congress include reductions or flat funding in coming budgets. These issues are vulnerable to public pressure, so keep contacting your U.S. House and Senate representatives to tell them what is important to you. AFT is also party to a lawsuit protecting our data from DOGE.

Next, Krystle Able from IARA (Illinois Alliance for Retired Americans) reported on their work with Citizen Action Illinois on prescription drug affordability (HB 1443/SB 66). They were unable to get the bill through committee this year but will be trying again next year. She urges us to get in touch with her at [kable@illinoisretiredamericans.org](mailto:kable@illinoisretiredamericans.org) for instructions on how to participate in a postcard campaign to lawmakers.

Finally, UPI4100 President John Miller and IFT Legislative Director Nick Yelverton gave a state legislative update:

- SB 13, the Equitable Funding Formula, is supported by IFT and UPI. Our regional institutions provide the most social mobility for Illinoisans and must be adequately funded for equity.
- HB 3717 allowing community colleges to offer 4-year degrees, is opposed by UPI. IFT is neutral.
- Tier 2 Reform—information on how to help advance this issue is available on the IFT website <https://www.ift-aft.org/fixtier2>
- SJR 13 on creating a University Library & Professional Librarian Access & Transparency Task Force is supported by UPI and IFT.

It was an informative meeting and we look forward to following up on all of these issues over the next year.

## Meet New Executive Board Member and Newsletter Editor Kerry Ferris

(Kerry Ferris)

I started 2025 by retiring from NIU as an Associate Professor of Sociology and Past President of the UFA-NIU (TT) Chapter of UPI 4100, and immediately joined the Retirees Chapter Executive Board as the NIU Representative. Thanks, Katharina Barbe, for keeping that seat warm for me!

I was a lifelong Southern Californian until I moved to Illinois in 2000. I am now a happy Midwesterner, living in Rockford with my husband, Greg, a fine woodworker, and our rising 9th grader, EJ, a visual artist. Also sharing our home: Lucy the Doberman, Kora the Chihuahua mix, and tabby cat twins Spencer and Asher. It's a crowded, furry and aesthetically pleasing home.



My research focused on the sociology of celebrity, and if you're interested you can see me talk about it on CBS Sunday Morning (Sept. 29, 2024) or read about it in *Stargazing: Celebrity, Fame and Social Interaction* (with Scott Harris; 2011, Routledge). I'm also the co-author of *The Real World: An Introduction to Sociology* (with Jill Stein, 2023 [9e], W.W. Norton), and we're working on the 10<sup>th</sup> edition now.

Getting involved in the UFA at NIU literally changed my life. I realized the power of collective action for social and political change, something sociology promises but that I'd never really participated in before. I also began to get more interested in politics, as I saw how NIU administrators tried to get faculty to fix things whose solutions would never be found in the classroom. I recently participated in the Illinois Women's Institute for Leadership Training Academy (Class of 2024), and am considering seeking elected or appointed office in the future. For now, I will hone my lobbying skills at our Higher Education Advocacy Days.

Fun fact: Retired NEIU Chapter President and fellow Retirees Executive Board Member Nancy Matthews and I both earned our doctorates in the Sociology Department at UCLA, where I served as her Teaching Assistant in 1989!

## Reminder: Support the Committee on Political Education (COPE) Fund!

The Retirees Chapter has an ongoing campaign to inform members about how they can contribute (or increase their contribution) to COPE. If you are receiving a monthly SURS benefit, you can do this through payroll deduction. If you are not, you can contribute by check. Details can be found at [www.upilocal4100.org/retirees](http://www.upilocal4100.org/retirees). With the elimination of Retirees Chapter dues, many of you have begun (or increased) COPE contributions. For those of you who have not, please consider doing so. It is important for us all to have some "skin in the game." Even a \$2 per month contribution or increase would be helpful (which was the monthly dues most of you were previously paying).

Go to [www.upilocal4100.org/retirees](http://www.upilocal4100.org/retirees) for more information.



## IARA Event, May 17th

(Bruce Barnard)



The Illinois Alliance for Retired Americans will host a breakfast with IL-91 State Representative Sharon Chung on Saturday May 17, 8:30 AM, at IBEW 197 in Bloomington. Sign-up information is on the poster, below.

Remember: it costs just \$10 to join both the National and Illinois chapters of this organization, and UPI Retirees will be entitled to seven delegates at the biannual conference in September in Ottawa. More information to come on that event.