

FALL 2024 UPI Retirees Chapter Newsletter

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UPI Retirees Chapter Executive Board

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Past President	Audrey Edwards	atedwards36@gmail.com

Greetings, UPI Retirees!

Here's your Fall 2024 Newsletter, covering activities for the past half year. Our chapter has made several major changes, effective as of this past August 1.

First, there are no longer dues for membership in the Retirees Chapter, in recognition of all we contributed to UPI during our working years. As UPI members retire, we now 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.

Now that membership is free, we hope that you will choose to contribute to COPE (Committee on Political Education) or increase the amount you already contribute if you haven't already done so. For more information, read the article in this newsletter "UPI Retirees Support the Committee on Political Education."

Second, the Chapter has new officers, elected this past spring. I have transitioned to President from my former position as Secretary-Treasurer. Jo Ann Karr is Vice President, and Steven Rock is Secretary-Treasurer. We thank Audrey Edwards and Marsha Katz for their many years of service as President and Vice President respectively. We are very fortunate that Audrey agreed to continue on our Executive Board in the position of Past President. She led our chapter with great dedication and skill for 9 years!

Third, the Chapter has four new representatives on our Executive Board: George Gerdow (NEIU Representative), Pamela Salela (UIS Representative), William Thompson (WIU Representative), and Nancy Matthews (Member-at-Large).

With all these exciting changes, we hope that you will get involved in our activities! To join our lobbying campaigns, 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. Let us hear from you!

Cordially,

Elizabeth ("Betsy") Essex

President UPI Retirees Chapter



Betsy Essex

Jon Blitz left this world on September 29, 2024

(Audrey Edwards)

I knew Jon when he served as president of the EIU chapter of UPI. In July of 2015, a new university president, faced with the budget impasse, was planning to end the contracts of many non-tenured faculty-- by that August. Jon successfully negotiated an extra semester for them with the proviso that tenured faculty defer their raises. That may have been EIU-UPI's finest hour; Jon had a way of calling out the best in us.

Jon also served in several other positions, among them as chief negotiator for EIU, as a delegate to the House of Delegates, and in retirement as the UPI Local treasurer, where he found a way to improve our financial standing.

To quote John Miller, "Jon was respected for his insight, calmness, willingness to help, humor, honesty, and moral strength. . . . There was great joy when he made an appearance at our annual House of Delegates dinner last March. We honored Jon by restarting our Wall of Fame with his induction."

Jon's obituary can be found at:

<https://www.burnsfuneral.com/obituaries/Jonathan-Blitz/#!/Obituary>

Truly, he will be missed.



Jonathan Blitz

UPI Retirees Support the Committee on Political Education - COPE Fund

As retirees, we are vitally concerned about the stability of our pensions and the provision of top-notch health care insurance. Funding for our public universities and a fix for those in Tier 2 are critical as well. Given the political winds, it is essential that we have a strong voice with access to elected governmental decision-makers. As they say, "money talks" and union lobbying in the political arena is part of this process. UPI and IFT meet with legislators from both parties who support labor and develop relationships with these legislators to effectively address our concerns. COPE is our political action committee.

The Retirees Chapter recently began a 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. 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).

Pre-Retirement Webinars

(Sandi Estep)

On October 10 and 11, 2024, the UPI Retirees Chapter (RC) invited UPI members to webinars dealing with retirement. The sessions focused on people who were 1-5 years away from retirement. These events were planned by Sandi Estep, Jo Ann Karr, and William Thompson.

The RC conducted two separate sessions: one session was devoted to those in the Retirement Savings Plan (self-managed plan) and one session was devoted to those in the Defined (guaranteed plan). Since the two plans are so different, it was decided that separating the sessions would be most beneficial to attendees. Separating the sessions allowed experts in each plan to share their knowledge with attendees.

A special thank you to Stephanie Kite and Marlys Johnson from SURS. Stephanie specializes in the RSP and Marlys specializes in the Defined Benefits Plans. Rohin Ullberg, a certified financial planning expert, provided those in the RSP with valuable information about their investment options. Steve Rock is a member of the SURS Board and gave insightful information about SURS. Here is what each session included, along with contact information.

October 9th – Defined Session Agenda:

- Elizabeth Essex, UPI Retirees Chapter President. Welcome
- Marlys Johnson, SURS Retirement Consultant (mjohnson@surs.org)
- Sandi Estep Health insurance (estep2001@comcast.net)
- Steven Rock Retirees Chapter Secretary-Treasurer and SURS Trustee (mfsmr2@gmail.com)
- Q & A
- John Miller UPI Local 4100 President. Closing

October 10th -- RSP Session Agenda:

- Elizabeth Essex, UPI Retirees Chapter President. Welcome
- Ms. Stephanie Kite, SURS Retirement Counselor (skite@surs.org)
- Rohin Ullberg, CLU, ChFC, CWS- Heartland Investment (rullberg@ifgrr.com, jim@rohinullberg.com or (708) 922 0505)
- Sandi Estep To withdraw your money or not, health insurance (estep2001@comcast.net)
- Steven Rock, Retirees Chapter Secretary-Treasurer and SURS Trustee (mfsmr2@gmail.com)
- Q & A
- John Miller, UPI Local 4100 President. Closing

The feedback was very positive. Look for a repeat of these sessions next year.

SURS Update

(Steven Rock)

For those in the Defined Benefit (DB) Plan, the return for fiscal year 2024 (ending June 30) was +8.3%. Taking a longer time horizon, the five-year annualized return was +7.4% and the twenty-year return was +7.2%. These all exceed the annual return goal of +6.5%. As of the end of August, assets totaled about \$24.5 billion, and the funding ratio was 46.6%.

As of the end of June, assets in the Retirement Saving Plan totaled \$4.5 billion.

The State FY 2024 appropriation of \$2.133 billion was paid fully and on-time. Benefit payments for FY24 were \$3.25 billion. The gap is funded by contributions from active employees and investment returns. The State required funding for SURS for fiscal year 2025 is \$2.213 billion.

While there have been some hearings on potential changes to the Tier 2 plan, nothing passed out of the legislature. It is more likely something will take place in the fall veto session or the lame duck session next January.

The legislative funding plan currently in place for SURS provides a ramp to get the system funding level to 90% by 2045. In his spring budget message, Governor Pritzker suggested the ramp be changed so that the system would be 100% funded by 2048. SURS' actuaries are strongly in favor of a 100% funding ratio. The legislature did not take action on this. Our actuaries analyzed the impact on SURS of the Governor's proposal and provided some alternate scenarios that would be more beneficial to SURS. These will be shared with the Governor and legislators.

Until recently, the State Comptroller could only send to the State pension systems the maximum of 1/12 of the annual required appropriation on a monthly basis. The law was changed so that if the Comptroller has extra funds, these can be distributed earlier in the fiscal year. This will allow the pension systems to increase earnings on the extra funds. Some of these earlier distributions have already taken place.

John Lyons, the current Board chair, was reappointed for another six-year term by the Governor. The Board has a vacancy for one appointed trustee and awaits action by the Governor.

The recent election for three Board seats (six-year terms) concluded. Collin Van Meter and Tony Vasquez were reelected to active member positions. I was (re)elected, this time to one of the two annuitant positions. There was one remaining vacancy for an elected member (three-year term) and this was filled by a vote of the elected trustees. That person is Herbert Pitman, from GSU.

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

UPI Local 4100 Retirees Legislative Report for Fall 2024

(Audrey Manley)

First of all ... A Big Thank YOU for voting, for encouraging others to vote and for checking for candidates endorsed by the IFT!!! I volunteered to sit in on one of those locally planned endorsement meetings. There were about 35 people there representing education from pre-school to universities. There were a number of candidates interviewed, and at the end of the meeting we voted on the candidates we recommended to the IFT. If you ever have the opportunity to attend one of these ... do it!

This election brought out many volunteers from your UPI Retirees. A lot is at stake in every election, so it is up to us to make a difference in election outcomes. Our members canvassed in Kenosha and Moline. I think Betsy Essex and Nancy Matthews may have worn out a pair of shoes. Betsy, Nancy, Jo Ann Karr and Bruce Barnard along with Audrey Manley and Audrey Edwards did telephone banking for Congressional Representatives. Phone banking is easy to do, and you are encouraged to help out this way next time.

From the IFT "It's Time to Fix Tier 2": Join public employees from across the state on November 13, at noon in front of the State Capitol. A large crowd is needed to support almost half of the teachers, paraprofessionals and college professors who will have to retire under the present system. Contact <https://upilocal4100.org/> for details on how you can represent us on that day!



Betsy, Jo Ann, Nancy and Audrey at IARA Power Lunch

the Illinois Alliance for Retired Americans (IARA) Power Lunch, where we were honored to hear Senator Dick Durbin and Congresswoman Jan Schakowsky share their wisdom and enthusiasm! The Retiree Champion Award went to State Representative Nabeela Syed, one of the youngest members of the Illinois General Assembly, who is a "champion of the needs and rights of seniors"!!! William McNary won the Frank and Beatrice Lumpkin Award for movement leaders "who committed their entire lives to building the labor movement and continue to push on for a better life for everyone." State Senator Dave Koehler was given the Jerry Prete award, honoring leaders "who have had a steadfast commitment to seniors, retirees, and workers throughout the state of Illinois."

Spring 2025 may seem far off, but petitions for School Boards and Library Boards will be filed the first week of November. Start now finding the candidates you want to support.

UPI Retirees officially has created a Legislative Committee. I was appointed as Legislative Liaison to the Local 4100 Legislative Committee to bring their goals and work to the Retirees. There are some issues that are more specific for retirees to be aware of and support so this committee will be designed to do that. Nancy Matthews has volunteered her expertise. Please contact me (38manley@gmail.com) if you are interested in joining the committee.

In September, Betsy Essex, Jo Ann Karr, Nancy Matthews and Audrey Manley attended



Nancy and Betsy with Representative Syed

Citizen Action Illinois Panel on Prescription Drug Affordability

(Nancy A. Matthews)

Citizen Action Illinois is a statewide coalition that leads campaigns for social and economic justice. On August 27, 2024, Nancy Matthews (recently retired from the NEIU chapter) attended their panel on their current campaign for a Prescription Drug Affordability Board.

The panel moderator was Timothy Jackson, Senior Director of Policy and Advocacy of the AIDS Foundation of Chicago. The panel included:

- Senator Celina Villanueva – 12th District (Southwest side of Chicago)
- Senator Robert Peters – 13th District (from downtown Chicago to IN border; member of the Black Caucus and Labor Committee)
- Dr. Anthony Douglas – Resident Physician at the University of Chicago
- Edith Avila Olea – Policy Manager for Illinois Coalition for Immigrant and Refugee Rights (ICIRR)

The lively panel discussion addressed the overall challenges of healthcare costs in the United States, and the ways that, especially for low-income people, healthcare gets pitted against basic needs. Sen. Villanueva spoke about her mother working through cancer treatments, and her many constituents facing bankruptcy due to medical debt. Dr. Douglas is troubled by patients who simply can't afford the prescriptions from medical providers. He said that 25% of hospitalizations are due to people not properly taking their medications, largely due to not being able to afford them. Themes that repeatedly came up were access to care and the persistent cost barriers for treatments, even if people have market-based ACA health insurance.

Proposed legislation (HB 4472 did not survive last year, but new proposals will be coming) would establish a Prescription Drug Affordability Board, which would help control drug prices. The discussion helped “inoculate” listeners against the usual arguments made by pharmaceutical companies – they threaten to reduce research and development of new drugs if they are regulated. But, as was pointed out, they spend huge amounts on advertising their products and want to protect their profits. Public power must be used to protect consumers.

You can learn more about Citizen Action's campaign for a Prescription Drug Affordability Board here: <https://citizenaction-il.org/pdab>



UPI Leadership Workshop

(George Gerdow)



Steven Rock with union leaders

Together with Steven Rock, Jo Ann Karr, I attended the UPI Leadership Workshop held August 9-11 in Westmont. The purpose of the workshop was to inform colleagues in new leadership positions in the now 12 UPI-chapters, 80% of whom are new. I saw my role as an “old hand” to be able to share my experience as a union officer (secretary), organizer, and instructor for 32 years at NEIU.

The first day was devoted to an explanation of the structure of UPI, and its place within the larger union

structures such as the IFT, AFT, and ultimately the AFL-CIO. Key emphasis was on how local autonomy is the hallmark. An introduction to union dues followed, which included explanations of the dues formula, what the dues are used for, COPE, as well as membership card logistics.



George Gerdow and other union leaders

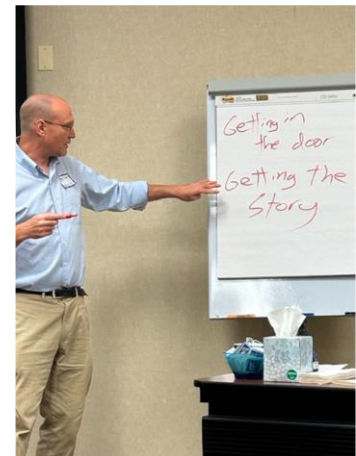
Saturday began with advice on how officers could and should best use their time. In this respect, an officer could follow a four-quadrant model known as the Eisenhower Matrix:

	urgent	not urgent
important	DO IMMEDIATELY	SCHEDULE
not important	DELEGATE or AVOID	DO LATER or DELETE

A key goal is for the officers to avoid burnout, the latter evidenced in the large turnover in leadership, especially after the last contract.

A treasurer workshop was followed by an overview of the legal framework of unions, particularly in Illinois. This was followed by an explanation of the mechanics of grievance basics and a discussion of Weingarten rights. Robert Vodicka and Mark van Wienen, the new NIU Tenure Track chapter president, then presented an approach to ORGANIZING NEW MEMBERS, which involved:

- 1) in-person organizing done in the prospective member's office (pre-COVID)
- 2) organizing during COVID (obtaining teaching schedules, waiting outside classrooms until students left, and then speaking after class to prospective members)
- 3) organizing in pairs (good cop/bad cop)



Robert Vodicka

- 4) Both 1 and 2 above relied on Department Reps as the key persons reaching out to potential new members. The idea is that it makes it harder for prospective members to say “no” to a colleague!

This all ties into coordinating the organizers. It is vital to get a broad pool of interested members to do this important work. However, the work is ideally fairly distributed, so that not too much work rests on too few shoulders (a sure recipe for burnout).

The final day was devoted to strategic and long-term planning. The executive board pondered the following issues:

Does strategic planning have a role in

- developing the union’s power?
- unifying the union and its members??
- ultimately strengthening the union?

Thank you to Katharina Barbe, Departing Editor

(Betsy Essex)

This is the last issue of our newsletter that will be edited by Katharina Barbe. Katharina will be stepping down as Editor and as a Retirees Executive Board member on December 31. She brought a professional, polished look to our newsletter and helped transform it from an annual to biannual (fall and spring) publication. We will miss her editorial expertise and contributions to our board but anticipate that she will remain engaged in UPI activities. We commend and thank her for her service to the Retirees Chapter!



Meet New Executive Board Member Pamela Salela

(Pamela Salela)

Retired at last! I finished my academic librarian career at the University of Illinois at Springfield after 19+ years of commitment to students and area nonprofits.

I started my academic career as an older adult in the early 1980s after completing a Bachelors in English with a minor in Women's Studies. I then went on to pursue a graduate degree in Educational Policy Studies with a focus on philosophy of education before completing my formal education with a graduate degree in Library and Information Science from the University of Illinois' Information School in 1999.

My first position in an academic library was at Miami University of Ohio. I then moved to St. Cloud State University (SCSU) of Minnesota where I was a Reference Librarian and also taught courses in Information Media in the College of Education for 3.5 years. While at SCSU I received a fellowship to the Zev Weiss Jewish Holocaust and Cultural Studies Institute held at Northwestern University in the summer of 2002. I then took on responsibilities in the Holocaust Resource Center at SCSU. My final career destination was the University of Illinois Springfield, where I joined the tenured faculty in the library in 2005. The very active shared governance system is what attracted me to UIS. While there I joined numerous committees and, most importantly, I became active in union organizing activities which morphed into union engagement once our first contract was signed.

In my position as the Public Services Government Information Librarian, I liaised with the social sciences departments. I was also fortunate to be able to teach credit bearing courses, such as in the Capital Scholars Honors Program, Freshman Seminar as well as in Women & Gender Studies I even designed new courses, for example, WGS32. *Working Class & Poor Women*; WGS47. *The Politics of Reproduction*, and CAP123. *How Do You Know? Intro to Community Informatics*.

In the Women & Gender Studies Section of the Association of College Research Libraries I served in many capacities including that of secretary, chair, as well as program chair. One of the highlights of that experience was when I chaired the program planning committee in AY20 and partnered with the ACRL Arts Section to develop our very successful panel, "Building bridges between libraries and marginalized groups: A closer look at engaging with women artists of Mexican ancestry to preserve their work."

I am delighted to be retired now but find it is important to remain vital to my various communities. In addition to the UPI Retirees Chapter, I am a member of the Vision Council of the United Way of Central Illinois. I also perform in the Make a Noise Ensemble (M.A.N.E.) directed by Ron Silver and am writing book reviews for Resources for Women & Gender Studies: A Feminist Review (<https://www.library.wisc.edu/gwslibrarian/gwsresources/>), a publication of the University of Wisconsin's Women & Gender Studies Library which is distributed throughout North America. In addition, I am looking forward to organic gardening (just had two large raised beds constructed) and am also helping Motherland Gardens located in Illinois' Capital with fundraising and other activities. Motherland Gardens focuses on urban agriculture and helping disenfranchised communities grow their own food and nourish each other through social engagement (<https://www.motherlandcommunityproject.org>).

I am looking forward to serving as the UIS Representative on the UPI Retirees Chapter Executive Board!



State-wide Library Committee Responds to Mass Firing of Tenured Faculty Librarians at Western Illinois University

(Pamela Salela)

UPI has sprung into action in response to the mass firing of faculty librarians (both T/TT and NTT) at Western Illinois University (<https://www.aft.org/news/beyond-book-bans-western-illinois-university-axes-librarians>). While WIU's actions were dramatic and highly visible, there is evidence of erosion occurring at other higher education institutions, and it is time to take action. The committee was brought together by UPI President John Miller for our first meeting on September 23rd via Zoom to begin discussing the implications and response. Thus far the committee has met three times and has developed a draft set of goals as well as a draft Senate Joint Resolution to establish a state-wide task force to investigate the ramifications of this dramatic action.

The committee currently consists of representatives from a wide range of institutions, and we are striving to achieve representation from every public higher education institution in Illinois. At present we are still seeking representation from SIU Carbondale as well as SIU Edwardsville. If you know of anyone at either of these institutions, please encourage them to get in touch with John Miller with regard to this.

The UPI Retirees Chapter has two librarians who are actively participating in the library committee: William Thompson (WIU) and Pamela Salela (UIS).

IARA Celebration

(Bruce Barnard)

The Illinois Alliance for Retired Americans (IARA) celebrated the anniversary of Social Security and Medicare the week of August 13th in Springfield, Chicago, and East Moline. The events focused on the historical significance of Social Security and Medicare in securing retirement security for millions of workers. Attendees heard from current candidates for office endorsed by the IARA.

- Nikki Budzinsky US Congress IL 13
- Jan Schakowsky US Congress IL 9
- Gregg Johnson IL Representative 72nd district
- Mike Halpin IL Senator 36th district

Current issues discussed included the Social Security Fairness Act. The act repeals current federal provisions that reduce Social Security benefits for individuals who receive other benefits, such as a pension from a state or local government. In addition, efforts to fix the inadequate Tier 2 pensions in Illinois were on the agenda. All legislators represented affirmed their commitment to protecting and expanding retirement with dignity.



Representative Nikki Budzinsky addresses attendees