

Fall 2023 UPI Newsletter

Greetings, UPI Retirees!

Here's your Fall 2023 Newsletter, covering activities for the past half year.

We hope these stories tempt you to get involved in Retirees Chapter activities. To join lobbying campaigns that affect your retirement benefits, please contact Audrey Manley, our legislative liaison. To support UPI activities at your university, please contact your campus representative. Your representative is also a good resource if you have questions or concerns about your benefits.

See the list below for names and email addresses of all Executive Board members. Let us hear from you!

Cordially,

Audrey Edwards



Audrey Edwards and John Miller
at the Local Executive Board meeting on
9/23/2023

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UPI Retirees Chapter Executive Board

Position	Name	Email Address
Chapter President	Audrey Edwards	atedwards36@gmail.com
Vice-President	Marsha Katz	katzmarsha02@gmail.com
Secretary-Treasurer	Elizabeth Essex	betsyessex101@gmail.com
Legislative Liaison	Audrey Manley	38manley@gmail.com
CSU Representative	Laurie Walter	cadavergal@gmail.com or l_walter624@yahoo.com
EIU Representative	Bruce Barnard	bkbarnard@hughes.net
GSU Representative	Sandi Estep	estep2001@comcast.net
NEIU Representative	Jo Ann Karr	jkarrhappy1@gmail.com
NIU Representative and Editor	Katharina Barbe	katharina.barbe@yahoo.com
UIS Representative	TBA - If you retired from UIS, please consider serving!	
WIU Representative	Steven Rock	mfsmr2@gmail.com

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## ***Highlights from SURS Committees and Board Meeting, September 8-9, 2023***

Steven Rock (WIU Representative)

*Investment Committee:* Two candidates for the Chief Investment Officer position were brought in for interviews before the full Board based on recommendations from the Ad Hoc Search Committee.

For the Defined Benefit (DB) Plan, the annual return for fiscal year 2023 ending June 30 was +5.3%. Due to the severe underfunding of the system (because of past shortfalls in state appropriations), the investment portfolio is set up in a defensive position, which will better protect the system with downside protection but will result in weaker results relative to other better funded pension systems in strong equity markets. This has played out in the last two fiscal years, where SURS underperformed in FY2023 and overperformed in FY2022. Performance over the last three years was +8.8% (36<sup>th</sup> percentile compared to other funds with assets greater than \$1 billion), +7.0% over the last five years (35<sup>th</sup> percentile), and +7.5% over the last ten years (42<sup>nd</sup> percentile). The funding ratio is 45%.

*Administrative Committee:* SURS' auditors, Gabriel Roeder Smith & Company (GRS), reviewed the economic assumptions used in the actuarial valuation that is used to determine the annual state required contribution, based on statute.

*Legal and Legislative Committee:* The required state appropriation to the system of \$2.12 billion for FY2023 has been paid in full and on time. The required contribution for FY2024 is \$2.13 billion. It is noted that the State has contributed another \$136 million in an extra appropriation over the last

two fiscal years. SURS is following the subject matter legislative hearings on SB4098 and 4099 which deal with potential fixes for Tier II members.

*Other:* SURS is offering a virtual stakeholder meeting on November 15th. Registration is required. SURS will be holding elections for three active member Board positions and one annuitant Board position. Applications and the ballot signature process will begin in October with the election held in April. More details are on the SURS web site.

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



### ***Legislative Wins in 2023***

Bruce Barnard (EIU Representative)

Audrey Manley (Legislative Liaison to UPI)

The Illinois Alliance for Retired Americans hosted a meeting on June 30 to review 2023 legislative wins. At the meeting, Citizen Action Illinois discussed endorsed legislation. Among many healthcare-related bills were insulin affordability, banning drug price gouging, increasing pesticide exposure penalties, and cultural competence training for healthcare workers. Additional legislation included gun manufacturers accountability, drivers' licenses for immigrants, allowing 16-year-olds to pre-register as voters, fairness and protection of temporary workers' safety, protection for rideshare passengers and a bill that modifies plumbing codes to permit more gender-neutral restrooms. Additional information and a legislator scorecard are available at <https://citizenaction-il.org/>.

The AFL-CIO reported on a bill requiring charter schools receiving public funding to adopt policies that enforce a neutral position on union organizing. Other bills included protection from harassment for public transportation operators and also for being more accountable for the safety issues of temporary workers. The AFL-CIO is also endorsing changes to casino regulations to allow formerly incarcerated individuals to hold back-of-the-house jobs. Work continues on additional protection for child labor and paid family leave. The state's FY 2024 budget fully funds the pension obligation and includes an additional 200 million dollars to reduce previously underfunded obligations.



## ***Legislative Report***

Audrey Manley (Legislative Liaison)

We have some work to do! UPI Retirees can help. The attacks on libraries and schools are escalating. The latest have been bomb threats to libraries. With Illinois no longer allowing “banned books,” attention is focusing on keeping collections separated. The attack on schools to limit inclusive information in the curriculum continues. The people who want everyone to only be exposed to their beliefs are across our state and nation. They are preparing for the spring 2024 election. They will be on the ballot as candidates to promote their influence on schools and libraries. You are aware of the issues. NOW is the time for ACTION. Here is where your valuable help can make a difference:

- use any resources you have in your community to find out issues faced by your school and library boards.
- find out who on these boards is a disrupter and who will be on the ballot in April 2024.
- contact friends who know these people, or you can attend their meetings.

This is the first step for taking ACTION to STOP this wave that negatively impacts the rights of all learners to have the opportunity to get information and make choices and decisions!

When you are able to identify the negative forces, you will be able to make decisions about who you will support, how to support different candidates, and how you can effectively become proactive in contacting voters to be sure that our library and school boards work to support learning.

The UPI Retirees Executive Board is very anxious for your help. We truly believe, we can make a difference. We are asking you to “keep us in the loop” and let us know how you are working to make sure we are moving in the right direction. You can email you progress to me, and I will share it with the Executive Board ([38manley@gmail.com](mailto:38manley@gmail.com)). Thank you in advance for you ACTION!! If there is any way I or any member of the Executive Board can help you, please let us know.

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Retiree Executive Board Member Profile - Bruce K Barnard

Bruce K Barnard (EIU Representative)



Bruce K. Barnard retired from the Eastern Illinois University faculty in December of 2020 after 15 years on the faculty of the School of Technology. He served as an Instructor and the Organizational Development Program Coordinator. All his life, he has had strong ties to Eastern Illinois University, where he not only earned a Master's Degree in Technology, but also a Graduate Certificate in Work Performance Improvement, and a Bachelor's Degree in Career and Organizational Studies. During his time at EIU, he was a strong advocate for working adults pursuing undergraduate and graduate degrees.

Before joining the faculty at EIU, Bruce served for more than 30 years in leadership at community-based nonprofits providing addictions treatment, mental health, and community corrections services. While working in community-based programs he developed an interest in non-profit board development, strength-based development, law enforcement and mental health collaboration, and critical thinking self-efficacy. He would carry these interests to his teaching at EIU.

Bruce joined the EIU Chapter of UPI in his first year as full-time faculty. As a member of UPI, Bruce advocated for voluntary representation on department and school committees, and multi-year contracts for non-tenure track faculty. One of his proudest moments at EIU came as the University was struggling to respond to the state budget crisis. Union leadership worked with the administration and the membership voted to defer a contractually obligated salary increase to save the jobs of annually contracted faculty who had received layoff notices due to the uncertainty of the state budget. Bruce was elected to Faculty Senate in 2018.

As a retiree, Bruce continues to work with Sarah Bush Lincoln Healthcare and the Lumpkin College of Business and Technology to maintain a 25-year tradition of leadership development at Sarah Bush through their Leadership Academy. He also keeps a toe in the academic environment by teaching an occasional class or participating in a class that interested him as a student. Bruce and his wife Susan live in rural Piatt County with their horses, cats, and an assortment of wild critters.



Pre-Retirement Seminars

Sandi Estep (GSU Representative)

On October 9 and 16, 2023, the Retirees Chapter (RC) invited both active and retired UPI members to seminars dealing with retirement. These events were planned by UPI Board Members Sandi Estep and JoAnn Karr. The sessions focused on colleagues who were 1-5 years away from retirement.

For the first time, the RC decided to conduct two separate sessions: one session was devoted to those in the Retirement Savings Plan (RSP; self-managed plan) and one session was devoted to those in the Defined Benefits Plan (aka 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 for experts in each plan to share their knowledge with attendees.

A special thank you goes to Keith Johnson and Marlys Johnson from SURS. Keith specializes in the RSP and Marlys specializes in the Defined Benefits Plan. Robin Ullberg, financial planning expert, provided those in the RSP with valuable information about their options. Mitch Vogel and Steve Rock are members of the SURS Board and gave insightful information to those in the Defined Benefits Plan.

Here is what each session covered, along with contact information.

October 9th -- RSP Session Agenda:

- Welcome (Audrey Edward, UPI Retirees Chapter President, atedwards36@gmail.com)
- Retirement Savings Plan (Keith Johnson, RSP SURS Director & Retirement Consultant KJohnson@surs.org)
- Rohin Ullberg, CLU, ChFC, CWS- Heartland Investment (rullberg@ifgrr.com, (708) 922 0505)
- Should you withdraw your money? And hints on health insurance (Sandi Estep Estep2001@comcast.net)
- Q & A
- Closing (John Miller, UPI 4100 President jmiller@upilocal4100.org)

October 16th --Defined Benefits Plan Session Agenda:

- Welcome (Audrey Edward, UPI Retirees Chapter President, atedwards36@gmail.com)
- Marlys Johnson, SURS Retirement Consultant (mjohnson@surs.org, (217) 378 8800)
- Mitch Vogel, past UPI Local 4100 President and SURS Exec Bd. Member (mvogel1225@yahoo.com)
- Steven Rock, Retirees Chapter Executive Board and SURS liaison (mfsmr2@gmail.com)
- Q & A
- Closing (John Miller, UPI 4100 President jmiller@upilocal4100.org)

The feedback has been very positive. Look for a repeat of these sessions in a year.

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## October “Illinois Alliance for Retired Persons” 2023 Senior Power Celebration

Audrey Manley (Legislative Liaison)

The IARA continues to fight for senior issues. Each year at the Senior Power Celebration, people who have demonstrated outstanding commitment to the workers of the State of Illinois, are honored. This year three awards were presented.

Brandon Johnson, mayor of the City of Chicago, received the *Retirees Champion Award*. He was unable to attend but sent his appreciation for the award as a “champion of needs and rights for retirees and seniors across the state”.

The *Frank and Beatrice Lumpkin Award* recognizes people who are “dedicated movement leaders” strengthening and building the labor movement with inspiration and dedication as they “push on for a better life for everyone”. Bea Lumpkin was present on Zoom to see Dan Montgomery, Illinois Federation of Teachers President, receive this award. He said that Bea was an example of someone who remains as “active” as he is and as he encourages others to be.



“roll up our sleeves for the best is yet to come”.

This year, the IARA meeting was taking place on Zoom due to budget issues. They would happily accept contributions

(<https://actionnetwork.org/fundraising/donate-to-the-illinois-alliance-for-retired-americans/>). Don Todd,

President of the IARA, served as host, thanked all who contributed, congratulated those who were honored and welcomed all who attended.



Chicago Mayor Brandon Johnson and Dan Montgomery, IFT, at the Luncheon for the UPI Retirees Chapter on 10/13/2023

Miller Rodgers, UAW Local 6 Retiree Chairperson and IARA Executive Vice President received the *Jerry Prete Award* for his many years serving, leading, and promoting the image and ideas that Jerry Prete promoted. Under his leadership, the IARA is committed to continuing the fight for senior issues with a “willing spirit” while remembering that “unity always works”.

In his “Call to Action”, William McNary, Co-Director of Citizen Action Illinois, gave an inspiring closing talk asking everyone to



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From the UPI President John Miller

A special shout out to the UPI Retirees. Thank you for all that you have done over the last year. While chapters were focused on bargaining fair contracts, you picked up the slack and helped organize our election efforts with a focus on the Workers' Rights Amendment. During the lead up to the strikes, you helped organize members and provided historical insights to bargaining. During the strikes you were out on the picket line. All the while you still hosted webinars to help explain complex federal law and help our active members prepare for retirement. We are all stronger because of your Chapter's efforts. On behalf of all our members, thank you for all your work and dedication to fairness and respect!



Wendell Johnson, former NIU UPI President and John Miller at the 2023 Fall NIU-UPI Ice-cream Social



FAST Fund needs Funds!

(Reprinted from the NEIU-UPI Newsletter)

Please consider donating to the UPI Fast Fund. Our students need support more than ever before! The Fast Fund has helped students with emergency grants when they face financial obstacles; these challenges include car repair, rental assistance, or paying past due balances at the university, among many others.

Simply click on this FAST Fund DONATION link ([Donate \(paypal.com\)](https://www.paypal.com)), select the UPI campus you feel closest to, and enter your information. Donations are tax deductible. Thank you for all you make possible for our students!