ANNUAL COLA BILL HAS A CHANCE

A new version of the annual COLA bill for state and school district retirees has been introduced by Representative Lynn B. Herman. The bill was referred to Committee on Education on March 31, 2004. There are currently 101 legislative co-sponsors.

The hopes for passage of this bill (House Bill 2496) rest on several new situations. First Governor Edward Rendell has stated he will support an annual Cola bill, a distinct departure from previous governors. Secondly many taxpayers should see the obvious benefit of letting our multi-billion dollar pension fund pay for the COLAs instead of taxpayer-costly borrowing practices used in the past. And there is the continued resentment over passage of Act 9 in 2001, which increased pensions for new retirees by 25% for state workers and 50% for state legislators. Also to be remembered is the state legislature will end its two year term at the end of this year.

Under this new legislation, according to Representative Herman, the annual cost-of-living increases will be determined by the Boards of Directors of the State Employees Retirement System (SERS) and the Public School Employees Retirement System (PSERS) based on the actual determination of the fiscal impact of cost-of-living adjustment on the fund.

The new legislation has been endorsed by the Pennsylvania Association of Retired State Employees (PARSE) and your own Board is expected to follow suit. Please contact your legislators to verify your own support of this important bill.

DON’T MISS

2004 Retiree Benefits Fair
Wednesday, June 16, 2004
9:30 - 4:30 PM
Penn Stater Conference Center
Sponsored by
Penn State
Office Of Human Resources
This event was a big success last year - Catch it this year.
Details later

Annual Meeting & Banquet
Thursday, May 13, 2004
Noon
Celebration Hall
2280 Commercial Blvd
Entertainment by:
CELTIC CLASSIC TRIO
Reservations by: May 8
Phyllis McGarvey 237-3614
President’s Message

As of February 2004, the Retired Faculty/Staff Club has a web Page on-line. Our technical specialist at PSU completed formatting the web page and will make changes as necessary, according to our web master's requests. To help serve the membership with information, send your email to Earl Elliott, exe1@psu.edu, the Retired Faculty/Staff Club webmaster.

Programs for retirees at the Penn Stater are focused on issues that concern Penn State retirees. For example, the March meeting topic was “Identity Thief: Issues in State College.” The speaker, Officer Specialist Tony Lopinsky, Crime Prevention Officer, Community Relations, State College Police Department gave an excellent talk and opened our eyes to many issues we might not be aware of.

We are building membership for our retiree clubs. Several officers of the Faculty Staff Club and the RETIRED Faculty Staff met recently in the Nittany Lion Inn for an exchange of ideas and Faculty Staff lunch. We parked in the nearby parking garage and had the parking check validated at the desk as we enter the NLI, so we parked at no charge. We enjoyed a light ($5.50) or regular lunch ($7.00) and discussed how decentralized groups, such as our Clubs, operate at the University Park Campus. We discussed overlapping membership in several clubs with like goals and memberships, (Faculty Staff Club, Retired Faculty Staff Club, Retirees Table at NLI, New Faculty Club & the Monday Luncheon Group at the Autoport). We plan on exchanging attendance at our executive club meetings, finding possible shared activities/events and exploring other ways to serve our memberships.

When you join the Retired Faculty Staff Club, you receive a Free First Year Membership. Our Club is seeking new members & expanding regular contacts with all retired PSU Faculty/Staff. To join or renew, checks for membership ($15 for three years) should be mailed to our Membership Chair, Phyllis McGarvey, 597 Galen Dr., State College, PA 16803-1117. Check the label on your next PostScript or meeting announcement to determine when your next dues payment is scheduled according to the indicated year above your name.

New Web Page A Joint Effort

Carter Ackerman, Gifford Albright, and Dan Bernitt designed the Retired Faculty Staff Web Page. Members of the Executive Committee helped review the process. Penn State's Office of Human Resources and Dr. Billie S. Willits, Associate Vice President for Human Resources provided a web location and continuing technical support. Earl Elliott, 03-04 President of the Retired Faculty/Staff Club <exe1@psu.edu> has volunteered to keep the web page updated on a regular basis. The Club will appoint a continuing web page committee, which meets with the executive committee and reports on web page activity. The web address is:

http://www.psu.edu/org/retfsclub

The idea of online communication among retired Faculty and Staff evolved with the development of online email and personal web pages for faculty, departments, or colleges. As increasing number of faculty and staff retire with online skills, the need for web page communication is a logical choice for development.

Dan Bernitt, Senior Research Associate Emeritus <dlb@psu.edu> believes the web page should be “open to the public”, i.e., anyone with an internet connection and a browser should be able to view it. All Penn State University Retirees and/or their spouses are eligible for membership; our motto is “Working Together to Enrich Our Lives”. Our mission is to build connections with you, your retired Penn State friends and Penn State. The Club wants to provide a voice for Penn State retirees.

2003-2004 Executive Committee

**2003-2004 Officers:**
- President - Earl Elliott
- 1st Vice President - Gifford Albright
- 2nd Vice President - Ralph Mumma
- Past President - James Starling
- Treasurer - Cordell Hatch
- Asst. Treasurer - David Maneval
- Secretary - E. Alan Cameron
- Membership Ch. - Phyllis McGarvey, Val Martin

**Standing Committees:**
- Programs - Gifford Albright

**2003-2004 Officers:**
- Publicity/Mailings/Comm./PostScript - Jack MacMillan / C. Ackerman
- Social - Phyllis McGarvey
- Friendship - Jane MacMillan / Betty Blazer
- Retirees Assistance Fund - Jim Rodgers / Marsha Bepple / Don Adam
- Student Emergency Fund - Milton Hallberg / David Bepple
- Volunteerism, Constitution & Bylaws - John Ziegler / Ernie Bergman
- Benefits - B. Wayne Kelly / Roberts Martin / Don Daum
- Chaplain - Don Crider
- University Relations - Leon Kneebone
- University Liaison to Office of Human Resources - Carter Ackerman with contact Mary Jo Livergood
- University Liaison for National Newsletter - Jack MacMillan with contact Raymond Marsh
Count Me In!

3 Years Dues (individual or couple) $15.00 [If your address label says 2004, your dues are due.]

Donation to Retiree's Assistance Fund
Donation to Student Emergency Fund
Total enclosed (Make checks payable to “The Penn State Retired Faculty/Staff Club”)

Send an application form for a Retiree's Assistance Fund award

Name(s) ____________________________________________
Address ____________________________________________

Phone __________________________ E-mail ____________

Today's Date ______________________ Retirement Year __________

Mail to: Penn State Retired Faculty/Staff Club
Office of Human Resources
120 S. Burrowes Street
The Pennsylvania State University
University Park, PA 16801-3857

STUDENT EMERGENCY FUND

Through generous contributions of our members over the past three years, the Retired Faculty/Staff Club has been contributing to Penn State's Emergency Grant-In-Aid Fund, a fund supporting domestic undergraduate students who experience personal difficulties or circumstances of an emergency nature that impairs their ability to remain enrolled at the University and at the same time meet their educational expenses. It is a unique and immediate source of financial support to students experiencing temporary financial crises.

These grants are administered by the Office of Student Aid and are not to exceed $500. We would like to provide at least two such grants each year. Examples of students supported by these grants in the past include: (1) a Philadelphia student who because of timing issues was not able to receive a federal grant that would have satisfied the last few hundred dollars owed for summer school charges, (2) a student from Mercer County from a significantly needy family who needed money to purchase Art History texts to complete required course assignments, and (3) a single parent student from Centre County who need additional funds to satisfy a child care bill.

We believe this to be a very appropriate way of helping to meet the educational goals of our promising undergraduate students and in this way supporting Penn State. The Fund is depleted at the present time, so we desperately need your help. If you have been planning to donate to this fund but have not yet done so, it is never too late. Any amount of a donation, however small, is encouraged. Donations can be made using the above “Count Me In” form.

RETIREE ASSISTANCE FUND

The Penn State Retired Faculty/Staff Club established a unique assistance fund in 1953 to help in emergency situations sometimes experienced by retirees and their spouses. During the past six years nearly $25,000 has been distributed to 60 individuals. These gift grants have averaged about $500. Following are some recipients of the funds:

- A 75-year-old spouse of a 1974 retiree received $500 to assist with heating and medical bills,
- A 1989 retiree received $500 to help with costs for an extensive medical treatment not covered by insurance,
- A 1978 retiree received $800 to help pay for his new glasses, orthopedic shoes, and a small wheelchair.

The Assistance Fund is supported by donations from retirees. To obtain the emergency monies, a written application must be submitted by an individual, caretaker, or agency which: (1) establishes the recipient as a PSU retiree or spouse, and (2) further explains the situation and the need. The application is reviewed by a committee from the Retired Faculty/Staff Club before the award is made.

To make a donation to the fund or to obtain an application for an award from the fund, use the above “Count Me In” form.

The Other Faculty/Staff Club

As members of Penn State's Retired Faculty/Staff Club, you are also eligible to join Penn State's Faculty/Staff Club, which offers opportunities to encourage collegiality, promote thoughtful discourse, and foster a sense of community throughout the University. Activities include theme dinners, special events, daily (low cost) Faculty/Staff Club lunches, receptions, and the Penn State Faculty/Staff Club Forum Speaker Series. Low-cost, yearly membership is $35 (University Park) Be a member of both clubs.

For an application, contact the id+ Card Office at 814-865-7590 or e-mail: fsclub@psu.edu

For more information go to www.psu.edu/dept/fsc/

New Website:
www.psu.edu/org/retfsclub
Retiree Representative to the Senate

During 2001-2002 the Penn State Faculty Senate passed legislation for the election of two retired faculty members as senators. Robert J. Heinsohn was elected for a four-year term and Judd Arnold was elected for a two-year term. This winter an election was held for a senator for a four-year term to replace Judd Arnold. The two candidates for election were Sabih I. Hayek, Distinguished Professor Emeritus of Engineering Mechanics and Herbera M. Lundegren, Professor Emerita of Hotel, Restaurant and Recreation Management and Senior Associate Dean Emerita, College of Health and Human Development. Retired faculty from the last ten years who are living in Pennsylvania and contiguous states were contacted by US mail to vote. “Herbie” Lundegren was elected to a four-year term beginning fall semester 2004.

It is important that retirees be represented and participate in Senate affairs because many issues, such as retiree health benefits are included in recommendations on health benefits generally.

Voluntary Phased Retirement and Reemployment of University Retirees

PSU Policy HR 29, “Voluntary Phased Retirement” describes a plan whereby faculty can reduce their service in approximately three steps to accommodate particular retirement plans. Policy HR 45 “Reemployment of University Retirees”, which describes the conditions under which faculty and administrators currently receiving retirement annuities can be reemployed and compensated by the university, may be of interest to some current retirees.

Application of HR 45 depends on which retirement system, SERS or TIAA CREF, individuals are enrolled in. Individuals enrolled in SERS must comply with strict guidelines prescribed by Pennsylvania law, whereas those enrolled in TIAA CREF are less constricted. Retirees interested in further information can contact their administrative division or PSU Human Resources.

2004-2005 Retired Faculty/Staff Club Upcoming Program Dates

<table>
<thead>
<tr>
<th>Date</th>
<th>Event</th>
<th>Location</th>
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<tbody>
<tr>
<td>Thursday, 13 May 2004</td>
<td>Annual Meeting with Entertainment</td>
<td>Celebration Hall - Noon</td>
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<tr>
<td>Thursday, 8 July 2004</td>
<td>Rock Springs Picnic 5:00 PM</td>
<td>Penn Stater - 2:00 PM</td>
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<tr>
<td>Thursday, 9 Sep 2004</td>
<td>Penn Stater - 2:00 PM</td>
<td>Thursday, 13 Jan 2005</td>
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<td>Thursday, 11 Nov 2004</td>
<td>Penn Stater - 2:00 PM</td>
<td>Thursday, 10 March 2005</td>
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