











### **Matthew Berns**

Matthew Berns is the Vice President for Legal and Regulatory Affairs at Hu-Friedy Mfg., leading global manufacture of dental hand instruments, based in Illinois. He earned his undergraduate degree in finance at the University of Illinois at Champaign and his law degree at the University of Michigan, Ann Arbor.

Berns is an attorney and has spent the bulk of his career as in-house counsel to leading companies in the telecommunications and manufacturing sectors. Berns began his career in public service, as a policy advisor in the office of then Illinois Treasurer Pat Quinn. Berns is active with his local American Youth Soccer Organization as a coach to his children's teams.



### **Trisha Cassidy**

Trisha Cassidy was appointed President, Gottlieb Memorial Hospital and Senior Vice President, Strategy, Loyola University Health System (LUHS) in July 2009. Prior to this appointment, she served LUHS in many capacities: Senior Vice President of System Development and Strategy (1998-2009) Vice President for Managed Care for the Health System (1998), Associate Vice President of Provider Relations (1995-1998), Director of Provider Contracting (1992-1995), and Manager of Provider Contracting (1990-1992).

Prior to coming to Loyola, Cassidy spent four years working for U.S. Healthcare and Lincoln National Insurance Companies and one year at Dimensional Marketing, a medically focused advertising agency in Chicago. Cassidy serves on the board of directors at RML Specialty Hospital and Leaders Bank. She holds an honorary appointment on the faculty of Loyola University Chicago Marcella Niehoff School of Nursing and is a co-course director at Loyola University Chicago Stritch School of Medicine. Cassidy is a cum laude graduate of the University of Illinois and received her MBA from Loyola University Chicago.



### **John Engstrom**

John H. Engstrom, CPA, CGFM, is KPMG Professor Emeritus of Accountancy at Northern Illinois University. His teaching and research specialty is governmental and not-for-profit accounting. He was co-author of one of the leading textbooks in the field, *Essentials of Accounting and Not-for-Profit Accounting* and author of numerous articles on governmental accounting and auditing in leading journals.

During his career, Engstrom was a member of the Governmental Accounting Standards Advisory Council, the U.S. Comptroller General's Advisory Council on Government Auditing Standards, the American Institute of Certified Public Accountants (AICPA) Governmental Accounting and Auditing Committee, the AICPA Not-for-Profit Organizations Committee, and related committees for the Illinois Society of CPA's.

Prior to his academic career, Engstrom was a financial manager in the University of Tennessee System administration and served as Vice Chancellor for Business and Finance at The University of Tennessee at Martin. Residing in Sycamore, Dr. Engstrom is married with five children and stepchildren, fourteen grandchildren, and one great-grandchild.



### **J. Fred Giertz**

J. Fred Giertz is a professor and head of the Department of Economics and member of the Institute of Government and Public Affairs at the University of Illinois at Urbana-Champaign. He has been at the University of Illinois since 1980. He received his Ph. D. in Economics from Northwestern University in Evanston, Illinois, in 1970.

Giertz follows general macroeconomic issues, especially as they impact Illinois. He also writes frequently on the Illinois budget and general economic issues in publications such as *State Tax Notes* and the *Central Illinois Business Magazine* and compiles the U of I Flash Index, a monthly indicator of the Illinois economy. Several recent articles have appeared in the *National Tax Journal*.

Since 2000, he has served as the Executive Director of the National Tax Association, a 1,200 member organization of tax professionals located in Washington, D. C.

(continued on next page)



### **Dorinda Miller**

Dorinda Miller has been employed at the University of Illinois at Urbana-Champaign for the past 21 years as a Staff Clerk. For the past six years, she has served as President of Local 3700 of the American Federation of State, County, and Municipal Employees (AFSCME), which represents more than 1,800 university employees. She also serves as President of the Champaign County Central Labor Council.

Miller has served on the board of the Champaign County United Way and as the Labor Liaison Supervisor on the Red Cross National Disaster Response Team. In that capacity, she spent several weeks in New Orleans aiding in relief efforts in the wake of Hurricane Katrina.



### **Steven Rogers**

Steven Rogers is the Gordon and Llura Gund Family Distinguished Professor of Entrepreneurship. He teaches Entrepreneurial Finance at Kellogg and is the Director of the Larry and Carol Levy Institute for Entrepreneurial Practice. Before joining the Kellogg Faculty, he owned and operated two manufacturing firms and one retail operation. Prior to becoming an entrepreneur, Rogers worked at Bain and Company Consulting firm, Cummins Engine Company, and UNC Ventures, a venture capital firm.

Rogers has received numerous teaching awards, including the 1996 and 2005 Lawrence G. Lavengood Outstanding Professor of the Year. He has received the Outstanding Professor Award for the Executive Program 19 times.

Rogers currently serves on the Advisory Board of Private Equity firm OCA Ventures. He also serves on the Board of Directors of SC Johnson Wax, W.S. Darley & Company, SuperValu (NYSE), Oakmark Mutual Funds, and AMCORE Financial (Nasdaq). He is a member of JP Morgan Chase's Capital Investment Committee. His non-profit work includes board membership for the A Better Chance Program and Urban Prep High School. Professor Rogers is also a former Trustee of Williams College and a former member of the Harvard Business School Visiting Committee.

In 2000, he received the "Bicentennial Medal for Distinguished Achievement" by an alum from Williams College. In 2005, he received the "Bert King Award for Service" from the African American Student Union of Harvard Business School. In 2005, he also was selected as "Chicago United's Business Leader of Color." In 2006, he was selected as one of the "100 Men Impacting Supplier Diversity."

In 2002 Professor Rogers published his first book, *The Entrepreneur's Guide to Finance and Business*. He has an MBA from Harvard Business School and a B.A. from Williams College.



### **Marva Williams**

Marva Williams has served as a Senior Program Officer for Chicago Local Initiatives Support Corporation since June 2007. She is responsible for planning and implementing programs and services for the Great Neighborhoods Program.

Williams serves as a program officer in four Chicago communities participating in the New Communities Program, a comprehensive community development initiative.

From 1996-2007, Williams was the Senior Vice President of the Woodstock Institute. She is also the coordinator of the CRA Coalition. She is a member of the Community Advisory Council of the Federal Reserve Bank, and is a volunteer with the North Side Community Federal Credit Union. Williams is a member of the National Partnership on Financial Education, which is convened by the Consumer Federation of America, and has served as an adjunct lecturer at University of Illinois at Chicago (UIC) College of Urban Planning and Policy Analysis.

Williams was selected by LaSalle Bank to receive the 2004 Tom Gobby Community Leadership Award for her commitment to helping lower-income households access the financial mainstream and develop assets. She was recognized by National Center of Poverty Law for her work on financial literacy and by Illinois Representative Eddie Washington for supporting the establishment of a state community reinvestment policy.

Williams holds a Master of Urban and Regional Planning from the University of Pittsburgh and a Ph.D. in Urban Planning and Public Policy from Rutgers University's Bloustein School of Planning and Public Policy.

## A Tribute To Jeannie Rennels



In this issue, SURS would like to include a tribute to our fellow co-worker, Jeannie Rennels, who passed away on November 7, 2008. She started working for SURS in 1993 as a Benefits Counselor in the Call Center. While serving in this role, she received such member comments as, “Jeannie exemplifies the true meaning of customer service. She is an asset to SURS.”

In 1995, Jeannie moved to a support staff position in the Mailroom. She was always fast and efficient in getting all of our mail opened and sending it on to the correct department. She sent out UPS and Fed Ex packages and prepared the choice election and member guide packets that are sent out to our members every week. She also contributed to the mailing of monthly annuity checks.

In addition to making sure our members got the information they needed in a timely manner, she was always willing to help out her fellow co-workers, no matter what the cause. Co-workers were always greeted in the Mailroom with her smile, laughter, and positive attitude. Her presence is truly missed. Jeannie is survived by her husband, Don Rennels, and mother-in-law, Helen Rennels. □

## Employee of the Year 2008: Mindy Inman

Mindy Inman has worked at SURS since 1988 and is currently the Chief Clerk in the Mailroom. Her friendly disposition, approachable demeanor, commitment to co-workers, and dedication to “getting the mail out” are qualities that make her a role model for the entire organization.

In recommending her for this award, SURS staff noted her positive, can-do attitude. Despite challenges brought about by illness and misfortune to her staff, Mindy did whatever it took to maintain an efficient, dependable operation.

At the same time, she went above and beyond in reaching out to her own staff both as a supervisor and friend to support their own personal needs while welcoming and training temporary staff and juggling her own duties to the benefit of the organization. □



*from left: Dan Slack, former Executive Director; Mindy Inman, and Mitchell Vogel, former SURS Board president*

## Employee of the Year 2009: Sharon Ingram

Sharon Ingram has worked at SURS since 2001 as a Business Analyst. Prior to that, she worked as a consultant for SURS for nine years. Her work ethic and commitment to co-workers are qualities that make her a role model for the entire organization.

She played a key role in the development of the Lump Sum Distribution Enhancement project. This project is one of the top three priorities for the organization and she has gone above and beyond to keep it on track.

Sharon has the ability to translate what the users need from this program and relay it to the programmers, as well as the ability to convey what information the programmers need from the users to create the best product possible. Most importantly, she maintains a cheerful disposition even in the most stressful situations and has a pleasant attitude that makes it easy for her co-workers to ask for exactly what they need. □



*from left: Sharon Ingram and Judy Parker, Interim Executive Director*

## SURS Member Website

Visit the new and improved SURS Member Website to check on your summary of benefits, view your employment and earnings history, update your personal information, and estimate your retirement. Go to [www.surs.org](http://www.surs.org) and click on “Member Access” to register or log on. □

Please note that the State Universities Retirement System does not endorse any provider of financial advice. Members seeking financial advice or planning assistance are encouraged to carefully select credentialed professionals.

**Member Service Representative**  
1-800-275-7877  
217-378-8800 (Champaign-Urbana Area)

**Internet**  
[www.surs.org](http://www.surs.org)

***The Advocate* is published by the State Universities Retirement System. We welcome your comments.**

**Editor:** Kendra Iffland

Printed by the authority of the State of Illinois

**SURS BOARD OF TRUSTEES**

Carrie Hightman, Chairwoman; Mitchell Vogel, Vice Chairman; Antonio Vasquez, Treasurer; Jeffrey Beaulieu, Matthew Berns, Patricia Cassidy, John Engstrom, J. Fred Giertz, Dorinda Miller, Steven Rogers, and Marva Williams.

Judith Parker, Interim Executive Director