



## MINUTES

**Quarterly Meeting of the Legal & Legislative Committee  
of the State Universities Retirement System  
Thursday, June 6, 2019, 3:30 p.m.  
Northern Trust  
Global Conference Center – 1<sup>st</sup> Floor  
50 S. LaSalle St., Chicago, IL**

The following trustees were present: Dr. John Engstrom, Mr. Richard Figueroa, Ms. Jamie-Clare Flaherty (via conference call), Dr. Fred Giertz, Mr. John Lyons, Dr. Steven Rock, Mr. Collin Van Meter and Mr. Antonio Vasquez.

Others present: Mr. Martin Noven, Executive Director; Mr. Douglas Wesley, Chief Investment Officer (CIO); Ms. Ellen Hung, Deputy CIO; Ms. Bianca Green, General Counsel; Ms. Kristen Houch, Head of Legislative Affairs; Ms. Suzanne Mayer, Chief Benefits Officer; Ms. Kelly Carson and Ms. Annette Ackerman, Executive Assistants; and Mr. Steve Zahn of Zahn Consulting Solutions.

Legal & Legislative Committee roll call attendance was taken. Trustee Figueroa, present; Trustee Giertz, present; Trustee Rock, present; Trustee Van Meter, present; and Trustee Vasquez, present.

## APPROVAL OF MINUTES

Trustee Rock presented the minutes from the Legal & Legislative Committee meeting of December 7, 2018.

Trustee Giertz moved:

- That the minutes from the December 7, 2018 Legal & Legislative Committee meeting be approved as presented.

Trustee Engstrom seconded and the motion carried with all trustees present voting in favor.

Trustee Rock presented the minutes from the Legal & Legislative Committee meeting of March 7, 2019.

Trustee Rock moved:

- That the minutes from the March 7, 2019 Legal & Legislative Committee meeting be approved as presented.

Trustee Engstrom seconded and the motion carried with all trustees present voting in favor.

## **CHAIRPERSON'S REPORT**

Trustee Rock did not have a formal chairperson report.

## **RULEMAKING AND COMPLIANCE UPDATES**

### **Approval of July 1, 2019 Regulatory Agenda**

Ms. Bianca Green presented the July 2019 Regulatory Agenda for approval, stating that no new items were added as compared to the SURS January 2019 Regulatory Agenda. She noted that twice per year, in January and July, a regulatory agenda must be filed with the Secretary of State's Office in Springfield. Discussion ensued regarding the repeal of the 3 percent rule.

### **Status of Pending Rules**

Ms. Green presented a memo with pending rule information. There are five administrative rules that are in second notice and SURS expects those will be approved after the JCAR meeting scheduled for June 11, 2019.

Trustee Engstrom moved:

- That the July 2019 Regulatory Agenda be approved and filed as presented.

Trustee Giertz seconded and the motion carried with all trustees present voting in favor.

A copy of the "July 2019 Regulatory Agenda" is incorporated as part of these minutes as [Exhibit 1](#). A copy of the staff memorandum titled "Rulemaking Update" is incorporated as part of these minutes as [Exhibit 2](#).

### **Trustee Status Legislation**

Ms. Green presented a memo with information concerning the Trustee Disqualification by Change in Status.

Trustee Van Meter moved:

- That the proposed statutory language change regarding the change in an elected trustee's status be approved as presented and filed during the spring 2020 Legislative Session and that staff be directed to promote the proposed statutory change as presented.

Trustee Vasquez seconded and the motion carried with all trustees present voting in favor.

A copy of the staff memorandum titled "Trustee Change in Status" is incorporated as part of these minutes as [Exhibit 3](#).

## **Compliance Stop Light Report**

Ms. Green directed the committee to the updated stop light report which shows that SURS is in compliance with its reporting requirements.

A copy of the report titled “May Compliance Report” is incorporated as part of these minutes as [Exhibit 4](#).

## **LEGISLATIVE UPDATE**

Ms. Kristen Houch and Mr. Steve Zahn provided the legislative update. Ms. Houch explained that the Illinois Department of Revenue and the Governor’s Office of Management and Budget reported that tax receipts were approximately \$1.5 billion higher than originally anticipated for FY 2019 and are expected to be \$800 million higher than originally anticipated for FY 2020. As a result, the Governor directed the \$800 million of additional revenue towards the state’s pension contribution for FY 2020 and decided not to alter the pension funding schedule.

Ms. Houch explained that there were two bills in the FY 2020 budget that directly affect SURS: Senate Bill 262 and Senate Bill 1814. The Governor signed these bills into law on June 5, 2019.

Ms. Houch identified the following bills as impacting SURS that passed both chambers and will go to the Governor for further action: House Bill 2029; House Bill 2460; Senate Bill 75; Senate Bill 1264; and Senate Bill 1265. Additionally, Ms. Houch discussed House Resolution 343, which urges the state to divest from any for-profit companies that contract to shelter migrant children.

Ms. Houch stated that the House and Senate adjourned for the summer, and that the fall veto session is scheduled for October 28 - 30 and November 12 - 14 in Springfield.

Ms. Green provided additional comments relating to the private letter ruling SURS received from the IRS regarding the issue of preliminary estimated payments. On May 28, 2019, the IRS issued its decision finding that SURS can provide preliminary estimated payments to its retiring members who choose the Tier I AAI Buyout before their final irrevocable election is made

Copies of the reports titled “June 2019 Legislative Update,” and “June 2019 Legislative Summaries,” are incorporated as part of these minutes as [Exhibit 5](#) and [Exhibit 6](#).

Lastly, Ms. Green reminded the board about the annual ethics training and the special meeting of elected board members on June 7, 2019 where they will discuss the upcoming annuitant position vacancy.

## **PUBLIC COMMENT**

There were no public comments presented to the Legal & Legislative Committee.

There was no further business brought before the committee and Trustee Vasquez moved that the meeting be adjourned. The motion was seconded by Trustee Engstrom and carried with all trustees present voting in favor.

Respectfully submitted,

A handwritten signature in black ink, appearing to read 'Martin Noven', with a long horizontal stroke extending to the right.

Mr. Martin Noven  
Secretary, SURS Board of Trustees

MMN:aa

## ILLINOIS REGISTER

## STATE UNIVERSITIES RETIREMENT SYSTEM

## JULY 2019 REGULATORY AGENDA

a) Part (Heading and Code Citation): Universities Retirement (80 Ill. Adm. Code 1600)

1) Rulemaking:

A) Description: The System anticipates rulemaking affecting the following:

Add Section 1600.200 Definition of Employee to implement Public Act 99-0897, effective January 1, 2017, regarding the definition of "employee" under Section 15-107 of the Illinois Pension Code.

Amend Section 1600.270 - Employer Contributions for Benefit Increases Resulting from Earnings Increases Exceeding 6% and 3%. Amendments will address changes made by the General Assembly which lowered the employer cost billing threshold from 6% to 3%, extends prior exemptions for vacation payouts and collectively bargained sick leave as referenced under the 6% rule, addresses how SURS will determine whether a collectively bargained agreement will be grandfathered in under the 6% rule and clarifies grandfathering exceptions for collective bargaining agreements that were already in place before the effective date of the new 3% rule.

Amend Section 1600.300 Effective Beneficiary Designations to address electronic execution and submission of beneficiary designation forms.

Amend Section 1600.305 – Full-Time Student Survivors Insurance Beneficiaries. Amendments will clarify that a student may qualify as being a “full-time” student if the combination of credit hours earned by the student at one or more accredited educational institutions, during the same time frame, equals a full-time workload as defined by either of the accredited educational institutions attended.

Amend Section 1600.420 Making Preliminary Estimated Payments to include procedures for holding payments when the member has not responded to informational requests, and to terminate the benefit after a period of non-compliance with the request.

Amend Section 1600.450 Overpayment Recovery to address *de minimis* revisions to benefit calculations and deductions for overpayments of less than \$100.

## ILLINOIS REGISTER

## STATE UNIVERSITIES RETIREMENT SYSTEM

## JULY 2019 REGULATORY AGENDA

Promulgate rules to establish acceptable documentary evidence for demographic information such as birth dates and marital status.

Promulgate rules to provide specific definitions and procedures to implement 40 ILCS 5/15-168 (concerning information requests necessary for the proper administration of the System and suspensions for non-compliance by members and penalties for non-compliance by employers).

- B) Statutory Authority: Article 15 of the Illinois Pension Code, 40 ILCS 5/15-177.
- C) Scheduled meeting/hearing dates: Written comments may be submitted during the 45-day public comment period following publication of the proposed rule in the *Illinois Register*. No public hearings are anticipated.
- D) Date agency anticipates First Notice: Spring through Fall 2019
- E) Effect on small businesses, small municipalities or not for profit corporations: None
- F) Agency contact person for information:
- Bianca T. Green, General Counsel  
State Universities Retirement System  
1901 Fox Drive  
Champaign, IL 61820
- Telephone (217) 378-8825  
Email: [bgreen@surs.org](mailto:bgreen@surs.org)  
Fax: (217) 378-9801
- G) Related rulemakings and other pertinent information: Other Amendments may be necessary based on emergent issues.



## MEMORANDUM

To: Legal & Legislative Committee

From: Bianca T. Green, General Counsel  
 Albert J. Lee, Associate General Counsel

Re: July 2019 Regulatory Agenda

Date: May 29, 2019

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This memorandum summarizes the rulemaking topics appearing on the proposed July 2019 Regulatory Agenda. Section 5-60 of the Illinois Administrative Procedures Act (5 ILCS 100-5-60) requires each agency to submit a regulatory agenda for publication in the Illinois Register by January 1 and July 1 of each year. The aim of the regulatory agenda is to solicit public comment on future rulemakings that the agency is considering, but for which no First Notice has yet been submitted to the Illinois Register. SURS is not required to promulgate rules appearing in the agenda, and it is not prohibited from proposing rules not appearing in the agenda. Rather, the goal is to give the public a sense of the rulemaking activities SURS might pursue in the coming year.

The following section references that were included in the January 2019 Regulatory Agenda have been removed because they are currently in Second Notice and should become law very soon:

- Amend Section 1600.110 – FOIA
- Amend Section 1600.271 – Governor’s Salary Rule
- Add Section 1600.460 – “Vested Inactive Buyout” Rules
- Add Section 1600.461 – “Automatic Annual Increases Buyout” Rules
- Amend Section 1600.625 – “VIB and AAI Buyout” Rules regarding QILDROS

We propose to include the following items on the July 2019 Regulatory Agenda:

- 1. Add Section 1600.200 Definition of Employee to implement Public Act 99-0897, effective January 1, 2017, regarding the definition of "employee" under Section 15-107 of the Illinois Pension Code.**

Public Act 99-0897, effective January 1, 2017, granted the SURS Board with the authority to make the final determination as to who is an "employee" for purposes of participation in SURS under new Section 15-107(k) of the Illinois Pension Code. Additionally, Public Act 99-0897 authorized the Board to promulgate rules on the topic. Prior to this legislation, SURS operated in conformity with the Fourth Appellate District's decision under *Wargo v. State Universities Retirement System*, 106 Ill. App. 3d 930 (1982), that held that employers were to construe who was an "employee", rather than the Board.

**2. Amend Section 1600.270 – Employer Contributions for Benefit Increases Resulting from Earnings Increases Exceeding 6% and 3%.**

SURS currently has administrative rules in place for applying the 6% Rule to FRE earnings. These proposed amendments will address changes made by the General Assembly that lowered that percentage from 6% to 3% and extended prior exemptions for vacation payouts and collectively bargained sick leave as referenced under the 6% rule. These rules will also address how SURS will determine whether a collectively bargained agreement will be grandfathered in under the 6% rule and clarifies grandfathering exceptions for collective bargaining agreements that were already in place before the effective date of the new 3% rule. (Effective as of 6-4-2018).

**3. Amend Section 1600.300 Effective Beneficiary Designations to address electronic execution and submission of beneficiary designation forms.**

SURS currently accepts beneficiary designations in the form of original, paper submissions with handwritten signatures. Many members do not have valid beneficiary designations on file. In the absence of a designated death beneficiary, death benefits are payable to the member's estate. Estate distributions follow statutory descent and distribution rules that may not reflect the member's intent. SURS is considering rulemaking that permits the electronic execution and submission of beneficiary designation forms through secure, online means to increase the uptake of beneficiary designations among its membership. Beneficiary designations that require notarizations (*e.g.*, when naming someone other than the spouse as the primary beneficiary under the Portable and Self-Managed Plans) would continue to be submitted in paper format.

**4. Amend Section 1600.305 – Full Time Student Survivors Insurance Beneficiaries.**

This rule, as currently written, defines a full time student as one who those who are “enrolled in a course of study in an accredited educational institution (other than a program of study by correspondence), and who is carrying a full-time workload as determined by the educational institution during the regular school year for the course of study the student is pursuing.” The proposed amendment will address recent changes in academic enrollment practices whereby it has become common practice for students to carry a full-time academic course load through concurrent enrollment at two separate, accredited institutions. Eligibility will still be determined on a full-time enrollment basis.

**5. Amend Section 1600.420 Making Preliminary Estimated Payments to include procedures for holding payments when the member has not responded to informational requests, and to terminate the benefit after a period of non-compliance with the request.**

This amendment would apply Section 15-168 of the Illinois Pension Code (Item #6, below) to Preliminary Estimated Payments (PEPs). SURS begins paying PEPs on the 1st

of the month on or following the effective date of retirement while benefits are being calculated and employment information is being verified with employers. Pursuant to Section 15-168(c) of the Illinois Pension Code, the rulemaking would permit PEPs to be suspended if an annuitant is unresponsive to informational requests necessary for the finalization of the benefit after 90 days of the request.

**6. Amend Section 1600.450 Overpayment Recovery to address *de minimis* revisions to benefit calculations and deductions for overpayments of less than \$100.**

This amendment would address small overpayments that are generated from revisions in benefits. These revisions may occur if an employer is delayed in submitting earnings or termination information, or if such data is revised by an employer. The rulemaking would create a *de minimis* rule that would allow staff to write off small overpayments balances of less than \$100.

**7. Promulgate rules to establish acceptable documentary evidence for demographic information such as birth dates and marital status.**

Currently, SURS accepts government-issued forms of identification and documentation to substantiate birth dates and marital status. The rulemaking under consideration would provide procedures in cases where SURS needs substantiation from members and beneficiaries living in foreign countries that may not have the same types of official documentation available in the U.S. Furthermore, the rulemaking may address topics such as identity verification and the substitute notarial requirements for members residing overseas.

**8. Promulgate rules to provide specific definitions and procedures to implement 40 ILCS 5/15-168 (concerning information requests necessary for the proper administration of the System and suspensions/penalties for non-compliance).**

In the event that a participant, beneficiary, or annuitant fails to respond to a request for information that is necessary for the calculation, payment, or finalization of any SURS benefit within 90 days of the request, Section 15-168(c) of the Illinois Pension Code permits SURS to "immediately cease processing the benefit and may not pay any additional benefit payment... until the requested information is provided." The rulemaking would provide more specificity as to the situations in which an information request would trigger the suspension and any potential exemptions.

**Staff Recommendation: That the Legal & Legislative Committee approve the July 2019 Regulatory Agenda substantially in the form presented for publication in the Illinois Register.**



## MEMORANDUM

**To: Legal & Legislative Committee**

**From: Albert J. Lee, Associate General Counsel**

**Date: May 23, 2019**

**Re: 2nd Quarter 2019 Rulemaking Update**

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The following proposed rulemakings (published at 43 Ill. Reg. 3163, Mar. 8, 2019) entered the Second Notice period as of May 3, 2019. The proposed rules will be considered at the Joint Committee on Administrative Rules (JCAR) hearing on June 11, 2019 in Room C600 of the Bilandic Building, Chicago, Illinois at 11:00 a.m.

**Freedom of Information Act – 80 Ill. Adm. Code § 1600.110** - The proposed rulemaking updates the SURS email address used to receive FOIA requests to “FOIA\_Officers@surs.org” and the telephone number for FOIA oral requests to the general SURS office line at 217-378-8800.

**Governor’s Salary Rule – 80 Ill. Adm. Code § 1600.271** - The Governor’s Salary Rule was added under Section 15-155(j-5) of the Illinois Pension Code by Public Act 100-23, effective July 6, 2017. The Governor’s Salary Rule requires employers to pay the employer normal cost for earnings paid to an employee in excess of the Governor’s salary. Public Act 100-624, which became effective on July 20, 2018, amended the Governor’s Salary Rule retroactively to July 6, 2017. Under the new law, earnings comparisons are no longer to be made on a full-time equivalent basis. The comparison year is based on the State fiscal year, rather than the “school” or “academic” year. Employers are exempt from billing to the extent that they have already paid the normal cost on the employee’s earnings. Finally, the new law grants SURS the authority to pursue employer delinquencies incurred under the Governor’s Salary Rule that are at least three years old by intercepting funds payable to the employer by the State Comptroller. The proposed amendments to Section 1600.271 implement these legislative changes.

**Vested Inactive (“VIB”) and AAI Buyouts – New 80 Ill. Adm. Code §§ 1600.460, 1600.461.** - Public Act 100-587, effective June 4, 2018, added Sections 15-185.5 and 15-185.6 to the Illinois Pension Code. Those sections provide that, beginning on the implementation date established by the SURS Board of Trustees and until June 30, 2021, vested inactive participants and retirees may receive an accelerated pension benefit payment in lieu of any future SURS pension benefits (VIB); or a portion of their 3% compounded automatic annual increases in exchange for a reduced and delayed automatic annual increases (AAI Buyout), respectively. The VIB is discounted by 40% of the present value of future benefits and the AAI Buyout is discounted by 30% of the present value of the portion of forfeited AAIs. The proposed rulemakings contain provisions necessary for the administration of these buyouts.

As part of the VIB and AAI Buyout implementation, the proposed rulemaking amends Section 1600.625 of the SURS regulations, concerning benefits affected by a Qualified Illinois

Domestic Relations Order (QILDRO), to require that any parties subject to a proceeding for the dissolution of marriage intending to share either the VIB or the AAI Buyout must submit a stipulated court order directing the manner and amount of the division of such buyout. Additionally, if there are other alternate payees who have priority rights over the member's benefits, then all affected parties must submit stipulated orders as to such manner and amounts of the division. These orders will satisfy the consent required under statute.



## MEMORANDUM

**To: SURS Board of Trustees**

**From: Albert J. Lee, Associate General Counsel**

**Date: April 10, 2019**

**Re: Trustee Disqualification by Change in Status**

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### **I. Statutory Background**

Section 15-159(g) of the Illinois Pension Code states that certain trustees are disqualified from office upon ceasing to be a “participant” or an “annuitant” of SURS. The language that eventually became Section 15-159(g) was enacted on July 21, 1995 under Public Act 89-196. At the time, the SURS Board of Trustees was made up of nine Governor appointees: two were required to be “participants”, two were required to be “annuitants”, and the remaining five were not required to be either participants or annuitants of SURS. The disqualification provision read as follows:

Trustees (other than the trustees incumbent on June 30, 1995) shall continue in office until their respective successors are appointed and have qualified, except that a trustee appointed to one of the participant positions shall be disqualified immediately upon the termination of his or her status as a participant and a trustee appointed to one of the annuitant positions shall be disqualified immediately upon the termination of his or her status as an annuitant receiving a retirement annuity.

This language remained largely unchanged despite a complete overhaul of the Board’s structure to the current one consisting of the Chairperson of the IBHE, four Governor appointees, and six elected trustees (effective July 2, 2009 under Public Act 96-6). The four Governor appointees may not be SURS members (*i.e.*, may not be participants or annuitants of SURS) nor hold an elective State office. The six elected trustees must consist of “four active participants of the system to be elected from the contributing membership of the system by the contributing members” and “two annuitants of the system who have been annuitants for at least one full year, to be elected from and by the annuitants of the system”. Other than inserting an exemption for trustees who were appointed under the prior statutory scheme, Section 15-159(g) was not amended to reflect the fact that “participant” and “annuitant” elected trustees are not Governor appointees. Additionally, Section 15-159(g) was not amended to reflect the fact that no Governor appointee could be a SURS member, whether as a participant or an annuitant. Section 15-159(g) had become ambiguous on its face; either the statute applied to the appointed trustees but imposed conditions that would never arise, applied to the elected trustees despite the ill-fitting emphasis on appointments, or did not apply at all.

## **II. Informal Opinion of the Attorney General**

The Board directed Legal staff to seek a legal opinion from the Office of the Attorney General on the statutory question. The Attorney General advised the Board in an informal opinion dated November 9, 2017 that "section 15-159 of the Illinois Pension Code is ambiguous" and recommended that "SURS pursue legislation to clarify the General Assembly's intent with regard to whether active participant members should be permitted to continue to serve on the System's board of trustees after a mid-term change in status."

## **III. Board Discussion Concerning Draft Legislation**

During the June 7, 2018 Legal and Legislative Committee meeting, the Committee members directed Legal staff to draft proposed legislation to clarify that active participant or annuitant members elected to the board after July 15, 2018 would be disqualified from serving as elected trustees upon the termination of his or her respective status. Legal staff presented draft legislation before the Committee on September 13, 2018. After discussion, the Committee directed SURS staff to make further revisions to the language and to make the provisions effective for trustees elected on or after the effective date of the legislation instead of using the "after July 15, 2018" language. Trustee Collin Van Meter also asked Legal staff to include language to address a change in status for appointed trustees. He suggested we add language that would disqualify the Governor appointees should they become SURS members or be sworn into a State elected office during their terms.

## **IV. Draft Legislation for Board Consideration**

Legal staff presented the revised language to the Legal and Legislative Committee on December 7, 2018 (attached as "Exhibit A"). The same language will be presented for consideration by the Board during the April 18, 2019 meeting. The draft language seeks to make the following changes:

1. The draft legislation adds a provision that immediately disqualifies a Governor appointee after the effective date of the legislation if he or she becomes a SURS member or is sworn into an elective State office. The draft legislation states that a vacancy caused by such a change in status is to be filled by a successor appointment by the Governor for the remainder of the term per Section 15-159(f).
2. The draft legislation immediately disqualifies an elected trustee after the effective date of the legislation if, as a participant trustee, ceases to be a "participating employee" or, as an annuitant trustee, ceases to be an annuitant. The vacancy would be filled by the elected trustees per Section 15-159(e). However, any elected trustee who is incumbent as of the effective date of the legislation will continue to serve out the remainder of his or her term in the position to which he or she was elected despite an otherwise disqualifying change in status.

In drafting the proposed legislation, Legal staff replaced the term “active participant” with the term “participating employee” for two reasons. First, the term “participating employee” is a defined term in the Illinois Pension Code and it is consistent with the understood meaning of “active participant”. Although the term “participant” is a defined term in Section 15-108 as being “a person participating in this system as specified in Section 15-134”, the term “active participant” is not defined. Section 15-159(d)(3) provides a meaningful clue for the application of this term by requiring “active participant” trustees to be elected from the “contributing membership of the system by the contributing members.” In Illinois Pension Code parlance, a “contributing member” is essentially equivalent to a “participating employee.” Per Section 15-109, a “participating employee” is defined as “[a] participant who at the time is an employee”. Per Section 15-107, an “employee” generally means an individual who is employed by a SURS-covered employer for at least 4 months or one academic term, whichever is less, in a position that is not irregular, or intermittent, or temporary. “Participating employees” are required to make ongoing contributions to SURS as a condition of employment. For example, Section 15-157(a) states, “[e]ach participating employee shall make contributions toward the retirement benefits payable under the retirement program applicable to the employee from each payment of earnings applicable to employment under this system....” Thus, by operation of the Illinois Pension Code, using the term “participating employee” instead of the term “active participant” ensures that an elected participant trustee must be currently employed by a SURS-covered employer and contributing to SURS with respect to that employment.

Second, using the term “participating employee” provides clear direction to the Board for scenarios where a participant trustee incurs a temporary interruption in employment duties, such as being on a formal leave of absence without pay or on a disability leave. Section 15-107 generally does not treat such scenarios as an interruption in employee status despite the temporary absence of earnings and, as a result, the temporary absence of contributions. Using the term “participating employee” also addresses the change in status situation where an elected trustee terminates their employment with a SURS covered employer. Keeping the term “active participant” does not address either of these situations and for these reasons, Legal staff has replaced all references of “active participant” with the term “participating employee” in the proposed legislation.

**EXHIBIT A**  
**DRAFT LEGISLATION**  
**TRUSTEE DISQUALIFICATION BY CHANGE IN STATUS**

(40 ILCS 5/15-159) (from Ch. 108 1/2, par. 15-159)  
 Sec. 15-159. Board created.

(a) A board of trustees constituted as provided in this Section shall administer this System. The board shall be known as the Board of Trustees of the State Universities Retirement System.

(b) (Blank).

(c) (Blank).

(d) Beginning on the 90th day after April 3, 2009 (the effective date of Public Act 96-6), the Board of Trustees shall be constituted as follows:

(1) The Chairperson of the Board of Higher Education, who shall act as chairperson of this Board.

(2) Four trustees appointed by the Governor with the advice and consent of the Senate who may not be members of the system or hold an elective State office and who shall serve for a term of 6 years, except that the terms of the initial appointees under this subsection (d) shall be as follows: 2 for a term of 3 years and 2 for a term of 6 years. The term of an appointed trustee shall terminate immediately upon becoming a member of the system or being sworn into an elective State office, and the position shall be considered to be vacant and shall be filled pursuant to subsection (f) of this Section.

(3) Four ~~active participants~~ participating employees of the system to be elected from the contributing membership of the system by the contributing members, no more than 2 of which may be from any of the University of Illinois campuses, who shall serve for a term of 6 years, except that the terms of the initial electees shall be as follows: 2 for a term of 3 years and 2 for a term of 6 years.

(4) Two annuitants of the system who have been annuitants for at least one full year, to be elected from and by the annuitants of the system, no more than one of which may be from any of the University of Illinois campuses, who shall serve for a term of 6 years, except that the terms of the initial electees shall be as follows: one for a term of 3 years and one for a term of 6 years.

For the purposes of this Section, the Governor may make a nomination and the Senate may confirm the nominee in advance of the commencement of the nominee's term of office.

(e) The 6 elected trustees shall be elected within 90 days after April 3, 2009 (the effective date of Public Act 96-6) for a term beginning on the 90th day after that effective date. Trustees shall be elected thereafter as terms expire for a 6-year term beginning July 15 next following their election, and such election shall be held on May 1, or on May 2 when May 1 falls on a Sunday. The board may establish rules for the election of trustees to implement the provisions of Public Act 96-6 and for future elections. Candidates for the participating trustee shall be nominated by petitions in writing, signed by not less than 400 participants with their addresses shown opposite their names. Candidates for the annuitant trustee shall be nominated by petitions in writing, signed by not less than 100 annuitants with their addresses

shown opposite their names. If there is more than one qualified nominee for each elected trustee, then the board shall conduct a secret ballot election by mail for that trustee, in accordance with rules as established by the board. If there is only one qualified person nominated by petition for each elected trustee, then the election as required by this Section shall not be conducted for that trustee and the board shall declare such nominee duly elected. A vacancy occurring in the elective membership of the board shall be filled for the unexpired term by the elected trustees serving on the board for the remainder of the term. Nothing in this subsection shall preclude the adoption of rules providing for internet or phone balloting in addition, or as an alternative, to election by mail.

(f) A vacancy in the appointed membership on the board of trustees caused by resignation, death, expiration of term of office, or other reason shall be filled by a qualified person appointed by the Governor for the remainder of the unexpired term.

(g) Trustees ~~(other than the trustees incumbent on June 30, 1995 or as provided in subsection (c) of this Section)~~ shall continue in office until their respective successors are appointed and have qualified, except that a trustee appointed elected to one of the participant participating employee positions after the effective date of this amendatory Act of the 101<sup>st</sup> General Assembly shall be disqualified immediately upon the termination of his or her status as a participant participating employee and a trustee appointed elected to one of the annuitant positions after the effective date of this amendatory Act of the 101<sup>st</sup> General Assembly shall be disqualified immediately upon the termination of his or her status as an annuitant receiving a retirement annuity.

An elected trustee who is incumbent on the effective date of this amendatory Act of the 101<sup>st</sup> General Assembly, whose status as a participating employee or annuitant has terminated after having been elected shall continue to serve in the participating employee or annuitant position to which he or she was elected for the remainder of the term.

(h) Each trustee must take an oath of office before a notary public of this State and shall qualify as a trustee upon the presentation to the board of a certified copy of the oath. The oath must state that the person will diligently and honestly administer the affairs of the retirement system, and will not knowingly violate or willfully permit to be violated any provisions of this Article.

Each trustee shall serve without compensation but shall be reimbursed for expenses necessarily incurred in attending board meetings and carrying out his or her duties as a trustee or officer of the system.

(Source: P.A. 98-92, eff. 7-16-13.)

**Effective Date: Immediately upon becoming law.**

MAY COMPLIANCE REPORT (2019)

Report Owner: Compliance Officer		* Indicates new requirement/change in requirement		EOQ= End of Quarter	EOM=End of Month	Status	Notes
Department	Report	Filed With	Frequency	Statute/Rule	Last Filed	Next Due	
Administration	Travel Exception Report	IHETCB	Quarterly	80 IL 2900.105	4/3/2019	7/31/2019	
Administration	Drivers License & Insurance Certification	U of I	Annual	625 ILCS 5/7-203 & ICAR 44 Sec 5040.500	7/10/2018	6/30/2019	
Administration	Certification of Board Training Requirement	DFPR-Public Pension/Insurance Div	Annual	40 ILCS 5/1/113.18	6/29/2018	6/30/2019	
Administration	Notice of Regularly Scheduled Board Meetings	SURS Lobby and SURS website	Annual	5 ILCS 120.202	Sep-18	Dec-19	
Administration	Oath of Office	Internal	Ad Hoc	40 ILCS 5/15-159(h)	As needed	As needed	
Administration	Disclosure of Appointee Interest in State Contracts	SOS	Ad Hoc	5 ILCS 420/3A.30	As needed	As needed	
Administration	Trustee Indemnification Agreements	Internal & Fiduciary Council	Ad Hoc	40 ILCS 5/1-107 & Board Governance Bylaws 1.1	As needed	As needed	
Administration	iPad User Agreements	Internal	Ad Hoc	Internal Requirement	As needed	As needed	
Audit	Deceased Annuitant Reporting	Internal	Quarterly	30 ILCS 805/8.40	2/22/2019	6/30/2019	
Audit	Fiscal Year Audit Completion Report	Internal - Filed with the Executive Director	Annual	Fiscal Control & Auditing Act	9/12/2018	9/30/2019	
Audit	FCIAA Internal Control Certification	Auditor General	Annual	FCIAA	4/25/2018	5/1/2020	
Audit	Two Year Audit Plan	Internal/ ED approval/A & R Committee	Annual	30 ILCS 10/2003	6/27/2018	6/30/2019	
Audit	Submission of System Audit (due after FY end)	Governor - submitted by SURS and by the	Annual	State Auditing Act and 30 ILCS 5/3-14 and 40 ILCS 5/15-174	FY17 - 1/19/2018	FY18	
Finance	CAFR	Internal	Annual	40 ILCS 5/15-150	12/14/2018	12/31/2019	
Finance	GAAP	Comptroller	Annual (by 10/15)	PA 097-1055/ Financial Reporting Standards Board Act	final sent 10/26/2018	10/15/2019	We did not have final information until 10/22 to complete the report.
Finance	Public Accountability Report	Comptroller	Annual (by 10/15)	SAMS	8/8/2018	10/15/2019	
Finance	IRS Form 941-Employer Fed Tax Return Form	IRS	Quarterly	IRS CODE	4/24/2019	7/31/2019	
Finance	IRS Form 945 Annual Return of Withheld Federal Tax	IRS	Annual	IRS Code	1/29/2019	1/31/2020	
Finance	Cash Receipts and Disbursement Reports	Comptroller	Quarterly	SAMS	4/29/2019	7/31/2019	
Finance	Agency Fixed Asset Report	Comptroller	Quarterly	SAMS	4/19/2019	7/31/2019	
Finance	Accounts Receivable	Comptroller	Quarterly	SAMS	4/26/2019	7/31/2019	
Finance	Report on SMP Participation Rate	COGFA	Annual	40 ILCS 5/15	10/31/2018	11/1/2019	
Finance	Cert. of State Contribution and CIP	Governor, CMS, and Comptroller	Annual (final by 1/15)	40 ILCS 5/14A	1/14/2019	1/15/2020	
Finance	Department of Insurance Report	Pension Division of Illinois Dept. of Ins.	Annual	40 ILCS 5/1A-109	12/27/2018	12/31/2019	
Finance	IRS Form 1099R (FIRE)	IRS	Annual	IRS CODE	4/29/2019	4/1/2020	We received a filing extension to 5/1/19
Finance	IRS 1042: Withholding US income of Foreign Persons	IRS	Annual	IRS CODE	3/11/2019	3/15/2020	
Finance	Report on Voluntary Deductions	Comptroller	Annual (by 3/31)	5 ILCS 340/8	1/18/2019	3/31/2020	
Finance	Comptroller Agency Invoice	Comptroller	Annual	PA 98-0228	9/21/2017	No longer required	This report is no longer required due to the filing of the monthly Debt Transparency Reports.
Finance	Fee Imposition Report	Comptroller	Annual by 9/1	15 ILCS 405/16.2	7/26/2018	7/31/2019	
Finance	5 year review of 90% funding target	COGFA	5 years	40 ICLS 1-103.3	12/31/2015	12/31/2020	
Finance	Certification of Overpayments	Internal and Board of Trustees	Determined Internally	80 Ill Adm. Code Sec.1600.450	As needed	As needed	
Finance	IRS W-3	IRS	Annual	IRS Code	1/28/2018	1/31/2020	
Finance	Information to COGFA	COGFA	Ad Hoc/At will	40 ILCS 5/22-803	As needed	As needed	
Finance	Debt Transparency Report	Comptroller	Monthly (due on the 10th)	30 ILCS 105/9.08	4/29/2019	6/10/2019	
Finance	Illinois Revised Unclaimed Property Act	Treasurer's Office	Annual report due 11/1	765 ILCS 1026/15-403	1st report due 11/1/18	1st report due 11/1/19	Our 1st report may be due later - legislation is pending.
Finance/Mem Serv	Fin. Stmt. to Participants/ Serv. Cred Stmts	Annuitants	As requested	40 ILCS 5/15-175	Ongoing	ongoing	
Finance/Mem Serv	Reports to Reciprocals	Recip Systems	As requested	40 ILCS 5/20-126	Ongoing	ongoing	
Human Resources	Separation Report	State Universities Civil Service System	Monthly (w/in 10 days EOM)	Civil Service Rule 250.30	5/6/2019	6/10/2019	
Human Resources	Monthly Wage Report	IDES taxnet Online	Monthly (EXCEPT 1/4/7/10)	IDES PA 97-0689	5/17/2019	6/30/2019	
Human Resources	Form UI-3	IDES taxnet Online	Quarterly (1/31, 4/30, 7/31/10/31)	IDES PA 97-0689	4/18/2019	7/31/2019	
Human Resources	Report of Employee Served	State Universities Civil Service System	Quarterly (w/in 10 days EOQ)	Civil Service Rule 250.30	4/3/2019	7/10/2019	
Human Resources	Exempt Employees Report	State Universities Civil Service System	Quarterly	110 ILCS 70/36E	4/3/2019	7/10/2019	
Human Resources	Occupational Ethnic and Gender Report	State Universities Civil Service System	Quarterly (w/in 10 days EOQ)	Civil Service Rule 250.3.1	4/3/2019	7/10/2019	
Human Resources	Agency Workforce Report	Secretary of State; Office of Governor	Annual	5 ILCS 410/20	12/27/2018	12/31/2019	
Human Resources	TA-2	Legislative Audit Commission	Bi-Annually	St. Fin. Act 30 ILCS 105/12-3	1/3/2019	7/15/2019	
Human Resources	I-9 Eligibility	Internal In File	Ad Hoc w/in 20 days of hire	Dept. Homeland Security	Time of Hire	As needed	
Human Resources	SSA 1945	Internal In File	Ad Hoc w/in 20 days of hire	SSA	Time of Hire	As needed	
Investments	Investment Update Report	Online Surs.org	75 days after month end	Internal procedure - monthly	Feb filed 4/16/19	March due 5/31/19	This internal report will be filed in mid-June after No. Trust provides the required figures.
Investments	Investments Information Report - Monthly	Online Surs.org	Monthly (by the 15th)	30 ILCS 237/10 PA 93-0499	5/15/2019	6/15/2019	
Investments	Report to Gov. on MWDB Firms/HR/Vendors	Governor	Annual	40 ILCS 5/1-109	12/20/2018	1/1/2020	
Investments	Consultant Report on MWDB searches*	SURS Board of Trustees	Annual	40 ILCS 5/1-113.22	Both - 12/31/18	1/1/2020	These are filed in the same document with the item below.
Investments	Consultant Report on Economic Opportunities*	SURS Board of Trustees	Annual	40 ILCS 5/1-113.23	Both - 12/31/18	1/1/2020	
Investments	Quinquennial Rep. US Owned Foreign Securities**	Federal Reserve Bank	Only upon request 5 years	22 USC Sec 3101	2012		*req. threshold for reporting not met for 2018. Next reporting year = 2022 and only if we meet the reporting threshold.
Investments	Restricted Companies Divestiture Reporting*	Illinois Investment Policy Board	Annual	40 ILCS 5/1-110.16	3/28/2019	Not required for 2019	
Investments	Illinois Finance Entity/High Risk Home Loan Act Cert.	DFPR-Public Pension/Insurance Div	Annual	40 ILCS 5/1-110.10; PA 95-521	8/30/2018	7/31/2019	
Investments	Invest in Illinois	Governor	Annual	PA 96-0753	8/30/2018	9/1/2019	
Investments	Annual SEC ADV's from Financial managers	SEC	Annual-120 days from FY end	Investment Advisors Act of 19	Ongoing	Ongoing	*not all managers are required to file by 4/1
Investments	Investment Manager Fee Disclosure	SURS.org website	Quarterly	40 ILCS 5/1-113.14	3/28/2019	6/30/2019	
Investments	Written Investment Policies	Illinois Department of Insurance	Ad Hoc	40 ILCS 5/1-113.6	As needed	As needed	
Investments	IS Policy Exemptions, Forms and Contract Summaries	Illinois Procurement Policy Board	Ad Hoc	40 ILCS 5/1-113.14	As needed	As needed	
Investments	Qualified FOF Mgmt. Services Contract Summaries	SURS.org website	Ongoing	40 ILCS 5/1-113.15	As needed	As needed	
Investments	Annual Certification of Fiduciary Duty and Insurance	Internal on file	Annual	contract provision	8/16/2018	9/1/2019	
Legal & Ethics	Ethics Training for Registered Lobbyists	Secretary of State	Annual	25 ILCS 170	1/2/2018	12/31/2019	
Legal & Ethics	Lobbying Expenditure Report (20th)	Secretary of State	Monthly	25 ILCS 170/6	5/16/2019	6/20/2019	
Legal & Ethics	Lobbying Expenditure Report (5th)	Secretary of State	Monthly	25 ILCS 170/6	5/1/2019	6/5/2019	
Legal & Ethics	Statement of Economic Interests (Board and Execs)	Secretary of State	Annual	5 ILCS 420/4A-101	5/1/2019	5/1/2020	
Legal & Ethics	Annual Ethics Training for Trustees	Internal-Cert of Completion to EO	Annual	5 ILCS 430/5-10	6/30/2018	6/30/2019	
Legal & Ethics	Ethics Training Plan/Ethics Training State Employees	Office of the Inspector General	Annual	5 ILCS 430/5-10	4/30/2018	6/30/2019	
Legal & Ethics	Part 1- staff only online	ARDC Registration	Annual	128 Ill.2d 351, 538 NE 2d 1152	7/31/2018	7/31/2019	
Legal & Ethics	FOIA Officer Training & Annual Certification	IAG	Annual	5 ILCS 140/3.5	Dec-18	12/31/2019	
Legal & Ethics	Ethics Officer Designation Notice	IL Executive Ethics Commission	As Needed/Ad Hoc	2 IL 1620.83	As needed	as needed	

**MAY COMPLIANCE REPORT (2019)**

Legal & Ethics	Revolving Door Policy Sign off	Executive Inspector General	As Needed/Ad Hoc	5 ILCS 430/5-5-45	Time of Hire	As needed
Legal & Ethics	Ex Parte Communications Reports	Executive Ethics Commission	As Needed/Ad Hoc	5 ILCS 430/5-50	9/13/2017	As needed
Legal & Ethics	OMA Trustee Training	IAG	One Time	5 ILCS 120/1.05	current various dates	As needed
Legal & Ethics	QILDRO Forms Electronically Available	SURS.org website	Ongoing requirement	40 ILCS 5/1-119	current	as updated
Legal & Ethics	OMA Officer Training	IAG	Annual	5 ILCS 120/1.05	MPB 12/26/2018	12/31/2019
Legal & Ethics	Annual Completed Ethics Training and Reporting- Staff and Board -online & paper format	OEIG	Annual	5 ILCS 430/5-10	12/27/2018	12/31/2019
Legal & Ethics	Ethics Orientation for State of Illinois Employees-Pape	OEIG	W/in 30 days of hire	5 ILCS 430/5-10	As needed	As needed
Legal & Ethics	Cybersecurity Training for Staff and Trustees	Dept. of Innovation and Technology	Annual	20 ILCS 450/25	6/30/2018	TBD 2019
Legal & Ethics	Sexual Harassment Training for Staff and Trustees	OEIG	Annual	5 ILCS 450/5-10.5	11/12/2018	TBD 2019



100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HA #1 to HB 139	Rep. Greenwood	SEGIP Re-Enrollment after Nonpayment of Premiums	Allows an annuitant, survivor, or retired employee whose coverage has been terminated under the State Employees Group Insurance Program for nonpayment of premiums to re-enroll in the State Employees Group Insurance Program during the next enrollment period upon repayment of the unpaid premiums.		HA #1 Referred to Rules Committee on 4/9/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=0139&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=113961&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=0139&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=113961&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HB 199	Rep. Flowers	No Investments in Ford Motor Company	Prohibits the state-funded retirement systems from investing in Ford Motor Company and its subsidiaries.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=199&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=114063&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=199&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=114063&amp;SessionID=108&amp;GA=101</a>
HB 280	Rep. Guzzardi	No Investments in Companies that Contract to Build Border Wall	Prohibits the state-funded retirement systems from investing in companies that contract to build a border wall.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=280&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=114403&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=280&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=114403&amp;SessionID=108&amp;GA=101</a>
HB 329	Rep. Jones	University Student Athlete Employees	Requires universities to classify student athletes in the top three financially profitable intercollegiate athletic programs as employees. Authorizes universities to classify student athletes in other intercollegiate athletic programs as employees.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=329&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=114489&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=329&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=114489&amp;SessionID=108</a>
HB 350	Rep. Willis	Repeal 3% Rule and Re-Enact 6% Rule	Requires employers to pay the present value of the portion of any salary increases in excess of 6% (currently, 3%) during a participant's final rate of earnings period.	Identical to SB 60 (Sen. Bertino-Tarrant)	House Re-Referred to Rules Committee on 4/12/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=350&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=114533&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=350&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=114533&amp;SessionID=108&amp;GA=101</a>
HB 816 (ENGR)	Rep. Welch (Sen. Steams)	Fiscal Year 2020 Budget Implementation Bill	Creates the FY 2020 Budget Implementation Act to make changes in State programs that are necessary to implement the State budget for Fiscal Year 2020. Authorizes the use of moneys in the State Pensions Fund as part of the FY 2020 State contribution to SURS. Repeals the 3% rule and re-enacts the 6% rule. Extends the existing accelerated pension benefit payment options for three years (from June 30, 2021 to June 30, 2024).	Similar to SB 1814 (Sen. Steams; Rep. Harris)	House Placed on Calendar Order of Concurrence with SA #1 on 6/1/19; Passed the Senate (51-6-0) on 6/1/19	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=816&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=115070&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=816&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=115070&amp;SessionID=108</a>
SA #1 to HB 816	Sen. Steams	Fiscal Year 2020 Budget Implementation Bill	Creates the FY 2020 Budget Implementation Act to make changes in State programs that are necessary to implement the State budget for Fiscal Year 2020. Authorizes the use of moneys in the State Pensions Fund as part of the FY 2020 State contribution to SURS. Repeals the 3% rule and re-enacts the 6% rule. Extends the existing accelerated pension benefit payment options for three years (from June 30, 2021 to June 30, 2024).	Similar to HA #1 to SB 1814 (Rep. Harris)	SA #1 Adopted on 6/1/19	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=816&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=115070&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=816&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=115070&amp;SessionID=108</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 902	Rep. Ammons	Cannabis Legalization Equity Act	Requires 2.5% of the proceeds from the excise tax on cannabis to be transferred to SURS every three months. (Makes the same change for SERS and TRS.)		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=902&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115234&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=902&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115234&amp;SessionID=108&amp;GA=101</a>
HA #1 to HB 1260	Rep. Zalewski	Sporting Contest Safety and Integrity Act + Sports Wagering Act	Requires the remainder of net proceeds from sports wagering (after proceeds returned to players and amounts owed to the central system provider and licensed agent) to be deposited into the State Lottery Fund and then deposited in equal amounts to the Pension Stabilization Fund, the Common School Fund, and the State Construction Account Fund. Requires moneys collected by the Illinois Gaming Board under the Sports Wagering Act to be deposited into Sports Wagering Fund and then transferred in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #2, HA #3, and HA #4 to HB 1260 (Rep. Zalewski)	HA #1 Referred to Rules Committee on 5/8/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108</a>
HA #2 to SB 1260	Rep. Zalewski	Sporting Contest Safety and Integrity Act + Sports Wagering Act	Requires moneys collected by the Illinois Gaming Board under the Sports Wagering Act to be deposited into Sports Wagering Fund and then transferred in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #1, HA #3, and HA #4 to HB 1260 (Rep. Zalewski)	HA #2 Referred to Rules Committee on 5/8/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HA #3 to HB 1260	Rep. Thapedi	Sporting Contest Safety and Integrity Act + Sports Wagering Act	As it relates to SURS, HA #3 is identical to HA #2. Requires moneys collected by the Illinois Gaming Board under the Sports Wagering Act to be deposited into Sports Wagering Fund and then transferred in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #1, HA #2, and HA #4 to HB 1260 (Rep. Zalewski)	HA #3 Re-Referred to Rules Committee on 5/31/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108</a>
HA #4 to HB 1260	Rep. Thapedi	Sporting Contest Safety and Integrity Act + Sports Wagering Act	As it relates to SURS, HA #4 is identical to HA #3. Requires moneys collected by the Illinois Gaming Board under the Sports Wagering Act to be deposited into Sports Wagering Fund and then transferred in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #1, HA #2, and HA #3 to HB 1260 (Rep. Zalewski)	HA #4 Re-Referred to Rules Committee on 5/31/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=115632&amp;SessionID=108</a>
HB 1576	Rep. Spain	Downstate Police and Firefighter Pension Funds - Investment Consolidation	Increases the annual compliance fee paid by each pension fund to the Illinois Department of Insurance from \$8,000 to \$16,000. Establishes that certain penalties for non-compliance with the Illinois Pension Code apply to governmental units and pension funds (currently, governmental units) that are subject to any law establishing a pension fund or retirement system for the benefit of employees of the governmental unit.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1576&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=116040&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1576&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=116040&amp;SessionID=108&amp;GA=101</a>
HB 1605	Rep. Lilly	Climate Change Risk Minimization Policy	Requires each pension fund to develop a climate change risk minimization policy by December 31, 2020. Requires the climate change risk minimization policy to be updated annually and published on the pension fund's website. Requires previous versions of the policy to be kept on the pension fund's website for a period of 5 years.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1605&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=116105&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1605&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=116105&amp;SessionID=108&amp;GA=101</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 1625	Rep. Skillicorn	Voluntary Tier III Plan + Opt-Out + No Credit for Unused Vacation and Sick Leave	Requires SURS to prepare and implement a Tier III plan by July 1, 2020. Allows active Tier I and Tier II participants of SURS to elect to participate in the Tier III plan for future service. Allows Tier I and Tier II participants who elect to participate in the Tier III plan to irrevocably elect to terminate all participation in the defined benefit plan. Establishes that a person is not required to participate in SURS and allows active employees to terminate participation in SURS. Prohibits payments for unused vacation and sick leave from counting towards earnings for individuals who first begin participation in SURS on or after the effective date of the legislation. Prohibits unused sick leave from counting toward service credit for individuals who first begin participation in SURS on or after the effective date of the legislation.	Identical to HB 2279 (Rep. Morrison)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1625&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=116166&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1625&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=116166&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HB 2029 (ENRL)	Rep. Walker (Sen. Aquino)	Vested Inactive Buyout – Health Insurance Preservation	Ensures that members who take the Vested Inactive Buyout on or after June 4, 2018 under the State Employees’ Retirement System, State Universities Retirement System, and Teachers’ Retirement System preserve any applicable retiree and survivor health insurance benefits upon receipt of the buyout payment.		Passed Both Houses on 5/29/19 (House: 116-0-0; Senate: 56-0-0)	<a href="http://ilga.gov/legislation/bills/tatus.asp?DocNum=2029&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=117529&amp;SessionID=108">http://ilga.gov/legislation/bills/tatus.asp?DocNum=2029&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=117529&amp;SessionID=108</a>
HB 2029 (ENGR)	Rep. Walker (Sen. Aquino)	Vested Inactive Buyout – Health Insurance Preservation	Ensures that members who take the Vested Inactive Buyout under the State Employees’ Retirement System, State Universities Retirement System, and Teachers’ Retirement System preserve any applicable retiree and survivor health insurance benefits upon receipt of the buyout payment.		Passed the House (111-0-0) on 4/9/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2029&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=117529&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2029&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=117529&amp;SessionID=108&amp;GA=101</a>
SA #1 to HB 2029	Sen. Aquino	Vested Inactive Buyout – Health Insurance Preservation	Ensures that members who take the Vested Inactive Buyout on or after June 4, 2018 and before the effective date of the legislation (in addition to members who take the Vested Inactive Buyout on or after the effective date of the legislation) will receive any applicable retiree or survivor health insurance benefits.		SA #1 Adopted on 5/1/19	<a href="http://ilga.gov/legislation/bills/tatus.asp?DocNum=2029&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=117529&amp;SessionID=108">http://ilga.gov/legislation/bills/tatus.asp?DocNum=2029&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=117529&amp;SessionID=108</a>
HB 2054	Rep. Meier	Hydraulic Fracturing Tax Revenues Fund Pensions	Requires all moneys received by the Illinois Department of Revenue under the Hydraulic Fracturing Tax Act to be used only for the payment of pension obligations of the State of Illinois.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2054&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=117568&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2054&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=117568&amp;SessionID=108&amp;GA=101</a>
HB 2101	Rep. Smith	Racial Bias, Discrimination, and Harassment Omnibus	Establishes that all persons have a right to work in an environment free from racial discrimination and harassment. Prohibits all persons subject to the State Officials and Employees Ethics Act from racially discriminating against or harassing any person, regardless of any employment relationship or lack thereof. Requires each officer, member, and employee to complete, at least annually, beginning in 2020, a racial bias, discrimination, and harassment training program.	Identical to HB 2547 (Rep. Lilly) and SB 1485 (Sen. Lightford)	House Tabled on 4/3/19	<a href="http://ilga.gov/legislation/bills/tatus.asp?DocNum=2101&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=117733&amp;SessionID=108">http://ilga.gov/legislation/bills/tatus.asp?DocNum=2101&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=117733&amp;SessionID=108</a>

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 2279	Rep. Morrison	Voluntary Tier III Plan + Opt-Out + No Credit for Unused Vacation and Sick Leave	Requires SURS to prepare and implement a Tier III plan by July 1, 2020. Allows active Tier 1 and Tier 2 participants of SURS to elect to participate in the Tier III plan for future service. Allows Tier I and Tier II participants who elect to participate in the Tier III plan to irrevocably elect to terminate all participation in the defined benefit plan. Establishes that a person is not required to participate in SURS and allows active employees to terminate participation in SURS. Prohibits payments for unused vacation and sick leave from counting towards earnings for individuals who first begin participation in SURS on or after the effective date of the legislation. Prohibits unused sick leave from counting toward service credit for individuals who first begin participation in SURS on or after the effective date of the legislation.	Identical to HB 1625 (Rep. Skillicorn)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2279&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118129&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2279&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118129&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HB 2394	Rep. Meier	New Revenues Fund State Pension Obligations	Requires any new and additional revenue sources that exceed the fiscal year 2019 revenue forecasts reported by the Commission on Government Forecasting and Accountability in 2018 to be allocated towards the payment of current and continuing State pension obligations. Defines new and additional revenue sources as including, but not limited to, any new tax, fee, or surcharge that is enacted by the General Assembly on or after the effective date of the legislation.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2394&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118359&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2394&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118359&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HB 2440 (ENGR)	Rep. Martwick (Sen. Aquino)	SURS Technical Corrections Bill	SURS initiative that makes three technical changes to Article 15 of the Illinois Pension Code to reflect SURS' longstanding interpretation and administration of benefits.	Identical to SB 1265 (Sen. Aquino)	Senate Re-Referred to Assignments Committee on 5/10/19; Passed the House (111-0-0) on 3/27/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2440&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118448&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2440&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118448&amp;SessionID=108&amp;GA=101</a>
HB 2441	Rep. Martwick	State Serial Long Term Pension Obligation Bonds	Authorizes the issuance of \$105.620 billion in State Serial Long Term Pension Obligation Bonds to bring the funded status of the state pension systems up to 90% of assets to liabilities. Requires SERS, SURS, and TRS to deposit 36% of bond proceeds received into investment funds for the purposes of taking advantage of interest arbitrage from the bond proceeds and for making debt service contributions for the bonds. Creates a continuing appropriation for the repayment of principal and interest due on the bonds.	Similar to SB 178 (Sen. Aquino)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/fulltext.asp?DocName=&amp;SessionID=108&amp;GA=101&amp;DocTypeID=HB&amp;DocNum=2441&amp;GAID=15&amp;LegID=118449&amp;SpecSess=&amp;Session=">http://ilga.gov/legislation/fulltext.asp?DocName=&amp;SessionID=108&amp;GA=101&amp;DocTypeID=HB&amp;DocNum=2441&amp;GAID=15&amp;LegID=118449&amp;SpecSess=&amp;Session=</a>
HB 2452	Rep. Martwick	Tier I Social Security Benefit Buyout Option	Creates a voluntary buyout option whereby an eligible SURS member receives 50 percent of the difference between the present value of his or her Tier I retirement benefits and estimated Social Security benefits in exchange for a retirement annuity equal to estimated Social Security benefits with reduced and delayed automatic annual increases.		House Re-Referred to Rules Committee on 4/12/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2452&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118460&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2452&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118460&amp;SessionID=108&amp;GA=101</a>

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 2460 (ENRL)	Rep. Davis (Sen. Martinez)	Illinois Sustainable Investing Act	Requires every retirement system, pension fund, or investment board to adopt a written investment policy and file a copy of that policy with the Department of Insurance within 30 days after its adoption. Requires the investment policy to include material, relevant, and decision-useful sustainability factors to be considered by the board, within the bounds of financial and fiduciary prudence, in evaluating investment decisions. Establishes that sustainability factors include, but are not limited to: (1) corporate governance and leadership factors; (2) environmental factors; (3) social capital factors; (4) human capital factors; and (5) business model and innovation factors, as provided under the Illinois Sustainable Investing Act. Establishes that whenever a board changes its investment policy, it must file a copy of the new policy with the Department within 30 days.	Introduced Version Identical to SB 2062 (Sen. Martinez)	Passed Both Houses on 5/29/19 (House: 73-42-0; Senate: 37-19-0)	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108&amp;A=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108&amp;A=101</a>
HB 2460 (ENGR)	Rep. Davis (Sen. Martinez)	Illinois Sustainable Investing Act	Requires every retirement system, pension fund, or investment board to adopt a written investment policy and file a copy of that policy with the Department of Insurance within 30 days after its adoption. Requires the investment policy to include material, relevant, and decision-useful sustainability factors to be considered by the board, within the bounds of financial and fiduciary prudence, in evaluating investment decisions. Establishes that sustainability factors include, but are not limited to: (1) corporate governance and leadership factors; (2) environmental factors; (3) social capital factors; (4) human capital factors; and (5) business model and innovation factors, as provided under the Illinois Sustainable Investing Act. Establishes that whenever a board changes its investment policy, it must file a copy of the new policy with the Department within 30 days.	Introduced Version Identical to SB 2062 (Sen. Martinez)	Passed the House (66-46-0) on 4/4/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108&amp;A=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108&amp;A=101</a>
HA #1 to HB 2460	Rep. Davis	Illinois Sustainable Investing Act	Establishes that the investment policy must include material, relevant, and decision-useful sustainability factors to be considered by the board, within the bounds of financial and fiduciary prudence, in evaluating investment decisions. (In the original bill, the investment policy must include material, relevant, and decision-useful sustainability factors to be applied by the board in evaluating investment decisions.) Makes changes to the Illinois Sustainable Investing Act.	Nearly identical to SA #1 to SB 2062	HA #1 Adopted on 4/4/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108</a>
HA #2 to HB 2460	Rep. Davis	Illinois Sustainable Investing Act	Modifies the description of human capital factors to include responsible contractor and responsible bidder policies.	Identical to SA #2 to SB 2062	HA #2 Adopted on 4/4/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&amp;GAID=15&amp;DocTypeID=HB&amp;LegId=118468&amp;SessionID=108</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 2547	Rep. Lilly	Racial Bias, Discrimination, and Harassment Omnibus	Establishes that all persons have a right to work in an environment free from racial discrimination and harassment. Prohibits all persons subject to the State Officials and Employees Ethics Act from racially discriminating against or harassing any person, regardless of any employment relationship or lack thereof. Requires each officer, member, and employee to complete, at least annually, beginning in 2020, a racial bias, discrimination, and harassment training program.	Identical to HB 2101 (Rep. Smith) and SB 1485 (Sen. Lightford)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2547&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118654&amp;SessionID=108&amp;SecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2547&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118654&amp;SessionID=108&amp;SecSess=&amp;Session=&amp;GA=101</a>
HB 2567	Rep. Stava-Murray	Means Matter Suicide Prevention Act	Requires every public official in Illinois to complete a course of training on suicide prevention, beginning in 2020. Defines a "public official" as any person who is elected or appointed to public office in Illinois.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=2567&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=118696&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=2567&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=118696&amp;SessionID=108</a>
HB 2592	Rep. Cabello	No Elected Official Participation in Public Retirement Systems	Prohibits a person from participating in any pension fund or retirement system under the Illinois Pension Code with respect to an elected position to which the person was first elected or appointed on or after the effective date of the legislation.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2592&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118725&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2592&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118725&amp;SessionID=108&amp;GA=101</a>
HB 2664	Rep. Robinson	RUUPA Trailer Bill for Public Retirement Systems	Ensures that annuity, pension, and benefit funds held in a fiduciary capacity by or on behalf of certain public retirement systems remain in their respective trusts and are not paid or delivered to the State Treasurer's Office under the Revised Uniform Unclaimed Property Act.	Identical to SB 1264 (Sen. Aquino)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2664&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118852&amp;SessionID=108&amp;SecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2664&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118852&amp;SessionID=108&amp;SecSess=&amp;Session=&amp;GA=101</a>
HB 2740	Rep. Morrison	Supplemental Defined Contribution Plan	Requires the SURS Board of Trustees to establish and maintain a defined contribution plan to address the retirement preparedness gap for participants in a defined benefit plan who are not on track to maintain their standard of living in retirement. Authorizes Tier I participants and Tier II participants who first became participants before the defined contribution plan was established to voluntarily elect to enroll in the plan. Requires each Tier II participant who becomes a participant on or after the establishment of the defined contribution plan to be automatically enrolled in the plan at a contribution rate that is established by the SURS Board of Trustees, unless he or she opts out within 60 days after the date that he or she becomes a participant.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2740&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118985&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2740&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118985&amp;SessionID=108&amp;GA=101</a>
HB 2749	Rep. Morrison	Alternative Retirement Plan – Local Control of Benefits	Authorizes the board of trustees of a community college district that is an employer under Article 15 of the Illinois Pension Code to provide by resolution for an alternative retirement plan, either in addition to or in lieu of the existing plans under SURS, for its eligible new employees. Requires the alternative retirement plan provided by the community college district to be funded with contributions from that community college district and its employees who participate in the alternative retirement plan.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2749&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118994&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2749&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=118994&amp;SessionID=108&amp;GA=101</a>

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 2902	Rep. Hoffman	Tier II SURS Public Safety Retire at 60	Allows Tier II police officers and Tier II firefighters in SURS to retire at age 60 with 20 years of service, if eligible for the retirement annuity calculation for police officers and firefighters under SURS.	Similar to HB 3256 (Rep. Brady)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2902&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119211&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2902&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119211&amp;SessionID=108&amp;GA=101</a>
HB 2910	Rep. Martwick	Early Retirement Incentive	Allows certain Tier I members between 55 and 60 years of age under the State Universities Retirement System to elect to retire with an undiscounted retirement annuity up to five years early in exchange for accepting reduced automatic annual increases on retirement annuities and survivor annuities.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2910&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119219&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2910&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119219&amp;SessionID=108&amp;GA=101</a>
HB 3131	Rep. Wehrli	Annuitant Database	Requires SURS to establish and post an annuitant database on its website by July 1, 2020. Requires the annuitant database to be a searchable database of the names of all persons receiving an annuity from SURS and the amount of the annuity paid by SURS to that person each month.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3131&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119541&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3131&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119541&amp;SessionID=108&amp;GA=101</a>
HB 3256	Rep. Brady	Tier II SURS Police Officers Retire at 50 or 55	Allows Tier II members under SURS to retire with an undiscounted retirement annuity at age 55 with at least 10 years of service as a police officer or to retire with a discounted retirement annuity at age 50 with at least 10 years of service as a police officer.	Similar to HB 2902 (Rep. Hoffman)	House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3256&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119705&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3256&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119705&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HA #1 to HB 3308	Rep. Zalewski	Sports Wagering Act	Requires moneys collected by the Illinois Gaming Board under the Sports Wagering Act to be deposited into the Sports Wagering Fund and then transferred in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #2, HA #3, and HA #4 to HB 3308 (Rep. Zalewski)	HA #1 Re-Referred to Rules Committee on 3/29/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;GA=101&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108</a>
HA #2 to HB 3308	Rep. Zalewski	Sports Wagering Act	Requires moneys collected by the Illinois Gaming Board under the Sports Wagering Act to be deposited into the Sports Wagering Fund. Requires the net profit (i.e., the amount remaining after the deduction of administrative expenses of the Illinois Gaming Board) must be deposited in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #1, HA #3, and HA #4 to HB 3308 (Rep. Zalewski)	HA #2 Re-Referred to Rules Committee on 3/29/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108</a>
HA #3 to HB 3308	Rep. Thapedi	Sports Wagering Act	Requires the privilege tax on sports wagering revenues and any fees and penalties collected under the Sports Wagering Act to be deposited into the State Gaming Fund and then transferred in equal amounts to the State Construction Account Fund, the Pension Stabilization Fund, and the Common School Fund.	Similar to HA #1, HA #2, and HA #4 to HB 3308 (Rep. Zalewski)	HA #3 Re-Referred to Rules Committee on 3/29/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108</a>
HA #4 to HB 3308	Rep. Hernandez	Illinois Lottery Sports Wagering Act	Requires the privilege tax on sports wagering revenue to be deposited in equal amounts to the Pension Stabilization Fund, the Common School Fund, and the State Construction Account Fund.	Similar to HA #1, HA #2, and HA #3 to HB 3308 (Rep. Zalewski)	HA #4 Re-Referred to Rules Committee on 3/29/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119783&amp;SessionID=108</a>

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 3376	Rep. Batinick	Property Tax Relief and Pension Stabilization Fund Act	Creates the Property Tax Relief and Pension Stabilization Fund Act. Reduces the funding target for each of the five state-funded retirement systems from 90 percent to 70 percent of assets to liabilities in State Fiscal Year 2045. Requires the state to contribute the normal cost and unfunded liability components to the state-funded retirement systems each year. Requires a portion of \$2.4 billion deposited into the Property Tax Relief and Pension Stabilization Fund to be used for state contributions to the state-funded retirement systems.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3376&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119954&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3376&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=119954&amp;SessionID=108&amp;GA=101</a>
HB 3428	Rep. Hernandez	No Investments in For-Profit Companies that Contract to Shelter Migrant Children	Prohibits the state-funded retirement systems from investing in for-profit companies that contract to shelter migrant children. Defines "contract to shelter migrant children" as entering into a contract with the federal government to shelter migrant children under the federal Unaccompanied Alien Children Program or a substantially similar federal program.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3428&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120024&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3428&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120024&amp;SessionID=108&amp;GA=101</a>
HB 3518	Rep. Batinick	Tier I Automatic Annual Increase Calculation	Allows Tier I participants in retirement systems and pension funds (other than police and firefighter pension funds) to irrevocably elect to have automatic annual increases on retirement or supplemental annuities calculated as the annual unadjusted percentage increase in the consumer price index-u, except that no increase can be less than one percent or more than five percent.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3518&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120161&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3518&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120161&amp;SessionID=108&amp;GA=101</a>
HB 3524	Rep. Durkin	Tier I Offer and Consideration Pension Reform	Offers each Tier I member the option to elect lower automatic annual increases on his or her retirement and survivors annuities, in exchange for having future salary increases count towards the calculation of his or her pension benefits, receiving a consideration payment equal to 10 percent of his or her employee contributions made before the election, and paying 10 percent less in future employee contributions after the election.		House Re-Referred to Rules Committee on 3/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3524&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120185&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3524&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120185&amp;SessionID=108&amp;GA=101</a>
HB 3718	Rep. Harris	FY 2020 Governor's Introduced Budget	Appropriates \$1,626,692,000 for the state contribution to SURS for FY 2020 (\$1,426,692,000 from the General Revenue Fund and \$200,000,000 from the State Pensions Fund). The FY 2020 certified state contribution to SURS is \$1,854,692,000. Appropriates \$4,431,113 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the state contribution to the College Insurance Program for FY 2020. The FY 2020 certified state contribution to the College Insurance Program is \$4,431,113.	Identical to SB 2165 (Sen. J. Cullerton)	House Assigned to Appropriations-General Services Committee on 3/5/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=3718&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120573&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=3718&amp;GAID=15&amp;DocTypeID=HB&amp;LegID=120573&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SB 60	Sen. Bertino-Tarrant	Repeal 3% Rule and Re-Enact 6% Rule	Requires employers to pay the present value of the portion of any salary increases in excess of 6% (currently, 3%) during a participant's final rate of earnings period.	Identical to HB 350 (Rep. Willis)	Senate Re-Referred to Assignments Committee on 3/22/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=60&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=114513&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=60&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=114513&amp;SessionID=108&amp;GA=101</a>

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SB 75 (ENRL)	Sen. Bush (Rep. A. Williams)	Workplace Protections Omnibus	Contains several provisions designed to provide employee protections in the workplace. These include: protections against discrimination and harassment (including the rights of complainants); protections against non-disclosure clauses; annual training to prevent discrimination and harassment; the right to employment leave due to incidents of sexual violence and gender violence; and the annual reporting of certain settlements and adverse judgments and administrative rulings by employers to the Illinois Department of Human Rights.		Passed Both Houses on 6/2/19 (Senate: 59-0-0; House: 114-0-0)	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=0075&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=115041&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=0075&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=115041&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SB 178	Sen. Aquino	State Serial Long Term Pension Obligation Bonds	Authorizes the issuance of \$120.015 billion in State Serial Long Term Pension Obligation Bonds to bring the funded status of the state pension systems up to 90% of assets to liabilities. Requires SERS, SURS, and TRS to deposit 36% of bond proceeds received into investment funds for the purposes of taking advantage of interest arbitrage from the bond proceeds and for making debt service contributions for the bonds. Creates a continuing appropriation for the repayment of principal and interest due on the bonds.	Similar to HB 2441 (Rep. Martwick)	Senate Re-Referred to Assignments Committee on 3/22/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=178&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=115993&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=178&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=115993&amp;SessionID=108&amp;GA=101</a>
SB 262 (ENRL)	Sen. J. Cullerton (Rep. Harris)	FY 2020 Budget	Appropriates \$1,854,692,000 for the state contribution to SURS for FY 2020. The FY 2020 certified state contribution to SURS is \$1,854,692,000. Appropriates \$4,431,113 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the state contribution to the College Insurance Program for FY 2020. The FY 2020 certified state contribution to the College Insurance Program (CIP) is \$4,431,113.		Passed Both Houses on 6/1/19 (Senate: 40-19-0; House: 83-35-0)	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=262&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=116189&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=262&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=116189&amp;SessionID=108</a>
SB 1187	Sen. Oberweis	Right to Shop Act	Requires the Director of Central Management Services to conduct an analysis of the cost effectiveness of implementing an incentive-based program for enrollees and retirees of the state group health benefits plan offered under the State Employees Group Insurance Act of 1971. Requires a program found to be cost effective to be implemented as part of the next open enrollment.		Senate Re-Referred to Assignments Committee on 3/28/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1187&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117660&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1187&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117660&amp;SessionID=108&amp;GA=101</a>
SB 1264 (ENRL)	Sen. Aquino (Rep. Martwick)	RUUPA Trailer Bill for Public Retirement Systems	Ensures that annuity, pension, and benefit funds held in a fiduciary capacity by or on behalf of a retirement system, pension fund, or investment board under the Illinois Pension Code remain in their respective trusts and are not paid or delivered to the State Treasurer's Office under the Revised Uniform Unclaimed Property Act. Requires pension funds, retirement systems, and investment boards created pursuant to Articles 3, 4, and 22 of the Illinois Pension Code to adhere to certain compliance requirements regarding best practices to locate owners of unclaimed property.		Passed Both Houses on 5/31/19 (Senate: 58-0-1; House: 106-0-0)	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=1264&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=1264&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108</a>
SB 1264 (ENGR)	Sen. Aquino (Rep. Martwick)	RUUPA Trailer Bill for Public Retirement Systems	Ensures that annuity, pension, and benefit funds held in a fiduciary capacity by or on behalf of certain retirement systems, pension funds, or investment boards under the Illinois Pension Code remain in their respective trusts and are not paid or delivered to the State Treasurer's Office under the Revised Uniform Unclaimed Property Act.		Passed the Senate (56-0-1) on 4/10/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1264&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1264&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>

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SA #1 to SB 1264	Sen. Aquino	RUUPA Trailer Bill for Public Retirement Systems	Applies the provisions of the underlying bill to every pension fund, retirement system, and investment board under the Illinois Pension Code.		SA #1 Remains in Assignments Committee on 4/9/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1264&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1264&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HA #1 to SB 1264	Rep. Martwick	RUUPA Trailer Bill for Public Retirement Systems	Ensures that annuity, pension, and benefit funds held in a fiduciary capacity by or on behalf of a retirement system, pension fund, or investment board under the Illinois Pension Code remain in their respective trusts and are not paid or delivered to the State Treasurer's Office under the Revised Uniform Unclaimed Property Act. Requires pension funds, retirement systems, and investment boards created pursuant to Articles 3, 4, and 22 of the Illinois Pension Code to adhere to certain compliance requirements regarding best practices to locate owners of unclaimed property.		HA #1 Adopted on 5/21/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1264&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1264&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117798&amp;SessionID=108</a>
SB 1265 (ENRL)	Sen. Aquino (Rep. Martwick)	SURS Technical Corrections Bill	SURS initiative that makes three technical changes to Article 15 of the Illinois Pension Code to reflect SURS' longstanding interpretation and administration of benefits.	Identical to HB 2440 (Rep. Martwick)	Passed Both Houses on 5/21/19 (Senate: 55-0-0; House: 116-0-0)	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1265&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117801&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1265&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117801&amp;SessionID=108&amp;GA=101</a>
HA #1 to SB 1300	Rep. Martwick	Pension Omnibus Bill	Extends the existing accelerated pension benefit payment options for three years (from June 30, 2021 to June 30, 2024). Allows Tier 2 police officers and firefighters to retire at age 60 (instead of age 67) without a reduced retirement annuity. Requires the Governor to designate the Chairperson of the Board of Trustees. Requires SURS to publish a report on accelerated pension benefit payments by December 1, 2019. Makes a technical change related to the accelerated pension benefit payment option for Tier 1 and Tier 2 vested, inactive members.		HA #1 Referred to Rules Committee on 5/30/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1300&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=1300&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108</a>
HA #2 to SB 1300	Rep. Martwick	Pension Omnibus Bill	Removes provisions from HA #1 that require the Governor to designate the Chairperson of the SURS Board of Trustees and the Chairperson of the Teachers' Retirement System Board of Trustees.		HA #2 Referred to Rules Committee on 5/30/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1300&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=1300&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108</a>
HA #3 to SB 1300	Rep. Martwick	Pension Omnibus Bill	As it relates to SURS, HA #3 is identical to HA #1 as amended by HA #2. Extends the existing accelerated pension benefit payment options for three years (from June 30, 2021 to June 30, 2024). Allows Tier 2 police officers and firefighters to retire at age 60 (instead of age 67) without a reduced retirement annuity. Requires SURS to publish a report on accelerated pension benefit payments by December 1, 2019. Makes a technical change related to the accelerated pension benefit payment option for Tier 1 and Tier 2 vested, inactive members.	Similar to HA #1 to SB 1300 (Rep. Martwick)	HA #3 Recommends Be Adopted in House Personnel and Pensions Committee on 5/30/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1300&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108">http://ilga.gov/legislation/BillStatus.asp?DocNum=1300&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108</a>

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HA #4 to SB 1300	Rep. Martwick	Pension Omnibus Bill	Removes the effective date of the bill, making the bill effective in accordance with the Effective Date of Laws Act. Requires the report on the accelerated pension benefit payment options to be due on or before December 1, 2020 (instead of December 1, 2019).		HA #4 Recommends Be Adopted in Rules Committee on 6/1/19	<a href="http://ilga.gov/legislation/bills/latus.asp?DocNum=1300&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108">http://ilga.gov/legislation/bills/latus.asp?DocNum=1300&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=117910&amp;SessionID=108</a>
SB 1485 (ENGR)	Sen. Lightford (Rep. Lilly)	Racial Bias, Discrimination, and Harassment Omnibus	Establishes that all persons have a right to work in an environment free from racial discrimination and harassment. Prohibits all persons subject to the State Officials and Employees Ethics Act from racially discriminating against or harassing any person, regardless of any employment relationship or lack thereof. Requires each officer, member, and employee to complete, at least annually, beginning in 2020, a racial bias, discrimination, and harassment training program.	Identical to HB 2101 (Rep. Smith) and HB 2547 (Rep. Lilly)	House Re-Referred to Rules Committee on 5/10/19; Passed the Senate (48-0-0) on 4/12/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1485&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118374&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1485&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118374&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SB 1505	Sen. Hastings	Judges Keep Tier I Status	Establishes that a person who participates in the Judges' Retirement System prior to January 1, 2011 is deemed to be a person who first became a member or participant of the State Employees' Retirement System, State Universities Retirement System, or Teachers' Retirement System prior to January 1, 2011.		Senate Referred to Assignments Committee on 2/15/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1505&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118424&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1505&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118424&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SB 1671 (ENGR)	Sen. Martinez (Rep. Martwick)	Emerging Manager RFP Exemption	Modifies the definition of "emerging investment manager" to include investment managers with assets under management of less than \$10 million and more than \$20 billion, if they had assets of at least \$10 million but less than \$20 billion at the time of the initial contract with the retirement system, pension fund, or investment board. Exempts contracts for investment services with emerging investment managers from the competitive bidding requirements of the Illinois Pension Code. Allows a retirement system, pension fund, or investment board to contract with an emerging investment manager providing investment services in a multimanager portfolio for at least 2 years under a manager of emerging investment managers program, upon the written recommendation of the manager of emerging investment managers.		House Held on Calendar Order of 2nd Reading on 5/22/19; Passed the Senate (57-0-0) on 4/10/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1671&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118848&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1671&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118848&amp;SessionID=108&amp;GA=101</a>
SA #1 to SB 1671	Sen. Martinez	Emerging Manager RFP Exemption	Modifies the definition of "emerging investment manager" to include investment managers with assets under management of less than \$10 million and more than \$20 billion, if they had assets of at least \$10 million but less than \$20 billion at the time of the initial contract with the retirement system, pension fund, or investment board. Exempts contracts for investment services with emerging investment managers from the competitive bidding requirements of the Illinois Pension Code. Allows a retirement system, pension fund, or investment board to contract with an emerging investment manager providing investment services in a multimanager portfolio for at least 2 years under a manager of emerging investment managers program, upon the written recommendation of the manager of emerging investment managers.		SA #1 Adopted on 4/10/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1671&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118848&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1671&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118848&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>

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SB 1698 (ENGR)	Sen. Martinez (Rep. Martwick)	Public Retirement Systems Broadcast Open Meetings	Requires certain public pension funds and retirement systems to broadcast and maintain audio and video of their open meetings in real-time on their websites.		House Re-Referred to Rules Committee on 5/10/19; Passed the Senate (48-0-0) on 3/28/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118913&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118913&amp;SessionID=108&amp;GA=101</a>
HA #1 to SB 1698	Rep. Martwick	Public Retirement Systems Broadcast Open Meetings	Re-inserts the provisions of the introduced bill but exempts the Chicago Policemen's Pension Fund from the requirements of the legislation (in addition to Downstate Policemen's Pension Funds and Downstate Firefighters' Pension Funds).		HA #1 Re-Referred to House Rules Committee on 5/10/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118913&amp;SessionID=108&amp;SpecSession=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=118913&amp;SessionID=108&amp;SpecSession=&amp;Session=&amp;GA=101</a>
HA #1 to SB 1784	Rep. Hoffman	Public Retirement Systems – Personal Information Disclosures	Generally prohibits the disclosure of the following information of members or participants of a pension fund or retirement system: (1) The individual's home address (including ZIP code and county); (2) The individual's date of birth; (3) The individual's home and personal phone number; (4) The individual's personal email address; (5) Personally identifying member or participant deduction information; or (6) Any membership status in a labor organization or other voluntary association affiliated with a labor organization or labor federation (including whether employees are members of such organization, the identity of such organization, whether or not employees pay or authorize the payment of any dues or moneys to such organization, and the amounts of such dues or moneys).		HA #1 Recommends Be Adopted in House Labor and Commerce Committee on 5/30/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1784&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119271&amp;SessionID=108&amp;SpecSession=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1784&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119271&amp;SessionID=108&amp;SpecSession=&amp;Session=&amp;GA=101</a>
SB 1814 (ENRL)	Sen. Steans (Rep. Harris)	Fiscal Year 2020 Budget Implementation Bill	Creates the FY 2020 Budget Implementation Act to make changes in State programs that are necessary to implement the State budget for Fiscal Year 2020. Authorizes the use of moneys in the State Pensions Fund as part of the FY 2020 State contribution to SURS. Repeals the 3% rule and re-enacts the 6% rule. Extends the existing accelerated pension benefit payment options for three years (from June 30, 2021 to June 30, 2024).	Similar to SA #1 to HB 816 (Sen. Steans)	Passed Both Houses on 6/2/19 (Senate: 52-6-0; House: 97-17-1)	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1814&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119392&amp;SessionID=108&amp;SpecSession=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1814&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119392&amp;SessionID=108&amp;SpecSession=&amp;Session=&amp;GA=101</a>
SB 1827 (ENGR)	Sen. Morrison (Rep. Morgan)	Uniform Statement of Economic Interests	Creates a uniform statement of economic interests. Requires all filers to disclose: (1) assets with a value of more than \$25,000; (2) sources of income that generated in excess of \$10,000; (3) each creditor of a debt in excess of \$25,000; (4) each debtor of a debt in excess of \$25,000; (5) each lobbyist registered with any unit of government in Illinois with whom the filer maintains an economic relationship or who is a member of the filer's family; and (6) each source and type of gifts or honoraria in excess of \$1,000. Applies to statements of economic interest filed in 2020 and each year thereafter.		House Re-Referred to Rules Committee on 5/10/19; Passed the Senate (56-0-0) on 3/13/19	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=1827&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=119421&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=1827&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=119421&amp;SessionID=108</a>

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SB 1846	Sen. Schimpf	Veteran-Owned Businesses Utilization	Requires public retirement systems, pension funds, and investment boards to utilize veteran-owned businesses for certain contracts and services.		Senate Re-Referred to Assignments Committee on 3/22/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1846&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119492&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1846&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119492&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SA #1 to SB 1846	Sen. Schimpf	Veteran-Owned Businesses Utilization	Makes technical changes.		SA #1 Re-Referred to Assignments Committee on 3/22/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1846&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119492&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1846&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119492&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SB 1948	Sen. Tracy	3% Rule Exemptions	Creates exemptions to the 3% rule created by Public Act 100-0587 for overload work, overtime, and promotions.	Similar to SB 2145 (Sen. Villivalam)	Senate Re-Referred to Assignments Committee on 3/28/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1948&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119852&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1948&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119852&amp;SessionID=108&amp;GA=101</a>
SB 1952 (ENGR)	Sen. Manar (Rep. Willis)	Repeal 3% Rule and Re-Enact 6% Rule	Requires employers to pay the present value of the portion of any salary increases in excess of 6% (currently, 3%) during a participant's final rate of earnings period. Makes other changes.	Similar to SB 60 (Sen. Bertino-Tarrant) and HB 350 (Rep. Willis)	Passed the Senate (51-5-0) on 4/10/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1952&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119869&amp;SessionID=108&amp;GA=101">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1952&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119869&amp;SessionID=108&amp;GA=101</a>
SA #1 to SB 1952	Sen. Manar	Repeal 3% Rule and Re-Enact 6% Rule	As it relates to SURS, SA #1 to SB 1952 is identical to the underlying bill.		SA #1 Adopted on 4/10/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=1952&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119869&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=1952&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=119869&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HA #1 to SB 1952	Rep. Willis	Repeal 3% Rule and Re-Enact 6% Rule	Removes provisions of the bill that repeal the 3% rule and re-enact the 6% rule.		HA #1 Adopted on 5/15/19	<a href="http://ilga.gov/legislation/billsatus.asp?DocNum=1952&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=119869&amp;SessionID=108">http://ilga.gov/legislation/billsatus.asp?DocNum=1952&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=119869&amp;SessionID=108</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SB 2060 (ENGR)	Sen. Martinez (Rep. Martwick)	Emerging Investment Manager Goals – Total Fees Paid	Requires the goals for the policy for the utilization of emerging investment managers to be based on the percentage of total dollar amount of fees paid under (currently, the dollar amount of) investment service contracts let to minority-owned businesses, women-owned businesses, and businesses owned by a person with a disability. Requires the annual report to the Governor and the General Assembly to include the total dollar amount of fees paid under investment contracts with emerging investment managers (currently, the percentage of the assets under the investment control of emerging investment managers) for the three separate goals. Establishes that it must be the aspirational goal for a retirement system, pension fund, or investment board to use emerging investment managers for not less than 20% of fees paid in each asset class (currently, funds under management).		House Re-Referred to Rules Committee on 5/10/19; Passed the Senate (56-0-0) on 4/10/19	<a href="http://ilga.gov/legislation/bills/tatus.asp?DocNum=2060&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=120137&amp;SessionID=108">http://ilga.gov/legislation/bills/tatus.asp?DocNum=2060&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=120137&amp;SessionID=108</a>
SA #1 to SB 2060	Sen. Martinez	Emerging Investment Manager Goals – Total Fees Paid	Requires the goals for the policy for the utilization of emerging investment managers to be based on the percentage of total dollar amount of fees paid under (currently, the dollar amount of) investment service contracts let to minority-owned businesses, women-owned businesses, and businesses owned by a person with a disability. Requires the annual report to the Governor and the General Assembly to include the total dollar amount of fees paid under investment contracts with emerging investment managers (currently, the percentage of the assets under the investment control of emerging investment managers) for the three separate goals. Establishes that it must be the aspirational goal for a retirement system, pension fund, or investment board to use emerging investment managers for not less than 20% of fees paid in each asset class (currently, funds under management).		SA #1 Adopted on 4/10/19	<a href="http://ilga.gov/legislation/bills/tatus.asp?DocNum=2060&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=120137&amp;SessionID=108">http://ilga.gov/legislation/bills/tatus.asp?DocNum=2060&amp;GAID=15&amp;GA=101&amp;DocTypeID=SB&amp;LegID=120137&amp;SessionID=108</a>
SB 2062	Sen. Martinez	Illinois Sustainable Investing Act	Requires every retirement system, pension fund, or investment board to adopt a written investment policy and file a copy of that policy with the Department of Insurance within 30 days after its adoption. Requires the investment policy to include material, relevant, and decision-useful sustainability factors to be applied by the board in evaluating investment decisions, including, but not limited to: (1) corporate governance and leadership factors; (2) environmental factors; (3) social capital factors; (4) human capital factors; and (5) business model and innovation factors, as provided under the Illinois Sustainable Investing Act. Establishes that whenever a board changes its investment policy, it must file a copy of the new policy with the Department within 30 days.	Identical to HB 2460 as Introduced (Rep. Davis)	Senate Re-Referred to Assignments Committee on 4/12/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2062&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120139&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2062&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120139&amp;SessionID=108&amp;GA=101</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SA #1 to SB 2062	Sen. Martinez	Illinois Sustainable Investing Act	Establishes that the investment policy must include material, relevant, and decision-useful sustainability factors to be considered by the board, within the bounds of financial and fiduciary prudence, in evaluating investment decisions. (In the original bill, the investment policy must include material, relevant, and decision-useful sustainability factors to be applied by the board in evaluating investment decisions.) Makes changes to the Illinois Sustainable Investing Act.	Nearly identical to HA #1 to HB 2460	SA #1 Adopted on 3/20/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=2062&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120139&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=2062&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120139&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SA #2 to SB 2062	Sen. Martinez	Illinois Sustainable Investing Act	Modifies the description of human capital factors to include responsible contractor and responsible bidder policies.	Identical to HA #2 to HB 2460	SA #2 Postponed in Senate State Government Committee on 4/4/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2062&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120139&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2062&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120139&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SB 2145	Sen. Villivalam	3% Rule Exemptions	Creates exemptions to the 3% rule created by Public Act 100-0587 for participants who are 10 or more years away from retirement eligibility, overload work, overtime, and promotions.	Similar to SB 1948 (Sen. Tracy)	Senate Referred to Assignments Committee on 2/15/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2145&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120333&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2145&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120333&amp;SessionID=108&amp;GA=101</a>
SB 2165	Sen. J. Cullerton	FY 2020 Governor's Introduced Budget	Appropriates \$1,626,692,000 for the state contribution to SURS for FY 2020 (\$1,426,692,000 from the General Revenue Fund and \$200,000,000 from the State Pensions Fund). The FY 2020 certified state contribution to SURS is \$1,854,692,000. Appropriates \$4,431,113 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the state contribution to the College Insurance Program for FY 2020. The FY 2020 certified state contribution to the College Insurance Program is \$4,431,113.	Identical to HB 3718 (Rep. Harris)	Senate Referred to Assignments Committee on 2/27/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=2165&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120497&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=2165&amp;GAID=15&amp;DocTypeID=SB&amp;LegID=120497&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HJRCA 14	Rep. Skillicorn	No State Tax on Retirement Income	Amends Article IX, Section 3 of the Illinois Constitution to prohibit a State tax on retirement income. Defines "retirement income" as income derived from a pension or any other retirement plan.		House Referred to Rules Committee on 1/29/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=14&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegID=115882&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=14&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegID=115882&amp;SessionID=108&amp;GA=101</a>
HJRCA 19	Rep. Skillicorn	Repeal Constitutional Pension and Retirement Rights	Repeals Article XIII, Section 5 of the Illinois Constitution (Pension and Retirement Rights).	Identical to HJRCA 20 (Rep. Sosnowski)	House Referred to Rules Committee on 2/13/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=0019&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegID=118229&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=0019&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegID=118229&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HJRCA 20	Rep. Sosnowski	Repeal Constitutional Pension and Retirement Rights	Repeals Article XIII, Section 5 of the Illinois Constitution (Pension and Retirement Rights).	Identical to HJRCA 19 (Rep. Skillicorn)	House Referred to Rules Committee on 2/13/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=0020&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegID=118255&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=0020&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegID=118255&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HJRCA 21	Rep. Mazzochi	Protect Accrued and Payable Pension and Retirement Benefits	Amends Article XIII, Section 5 of the Illinois Constitution to apply to benefits that are already accrued and payable under the public pension systems and public retirement systems. Establishes that nothing in Article XIII, Section 5 of the Illinois Constitution limits the power of the General Assembly to make changes to future benefit accruals or benefits not yet payable, including for existing members of any public pension or public retirement system.	Identical to SJRCA 9 (Sen. Weaver)	House Referred to Rules Committee on 2/13/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=21&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegId=118583&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=21&amp;GAID=15&amp;DocTypeID=HJRCA&amp;LegId=118583&amp;SessionID=108&amp;GA=101</a>
SJRCA 9	Sen. Weaver	Protect Accrued and Payable Pension and Retirement Benefits	Amends Article XIII, Section 5 of the Illinois Constitution to apply to benefits that are already accrued and payable under the public pension systems and public retirement systems. Establishes that nothing in Article XIII, Section 5 of the Illinois Constitution limits the power of the General Assembly to make changes to future benefit accruals or benefits not yet payable, including for existing members of any public pension or public retirement system.	Identical to HJRCA 21 (Rep. Mazzochi)	Senate Referred to Assignments Committee on 2/15/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=0009&amp;GAID=15&amp;DocTypeID=SJRCA&amp;LegId=118819&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=0009&amp;GAID=15&amp;DocTypeID=SJRCA&amp;LegId=118819&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HJR 16	Rep. Murphy (Sen. Manar)	State Sponsored Health Clinic Task Force	Resolves that the State Sponsored Health Clinic Task Force is created to study the possibility of implementing a State of Illinois sponsored health clinic for state employees, dependents, and retirees, with the purpose of providing quality care and annual savings to the State's overall group insurance costs.		Resolution Adopted in Both Houses on 5/31/19 (House: 113-0-0; Senate: 50-1-0)	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=0016&amp;GAID=15&amp;DocTypeID=HJR&amp;LegId=115111&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=0016&amp;GAID=15&amp;DocTypeID=HJR&amp;LegId=115111&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
HR 6	Rep. Flowers	Urge Solution to Windfall Elimination Provision	Resolves that the Illinois House of Representatives urges President Trump and the United States Congress to continue to work to find a solution to the problems created by the Windfall Elimination Provision.		Resolution Adopted in the House on 5/15/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=6&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=113794&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=6&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=113794&amp;SessionID=108&amp;GA=101</a>
HR 27	Rep. McSweeney	Oppose Educational Pension Cost Shift	Resolves that the Illinois House of Representatives states its belief that an educational pension cost shift is financially wrong and would only serve to shift pension burdens from the State to the status of an unfunded mandate.	Similar to HR 117 (Rep. Skillicorn)	House Assigned to Miscellaneous Issues Subcommittee on 2/21/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=27&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=114477&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=27&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=114477&amp;SessionID=108&amp;GA=101</a>
HR 32	Rep. McSweeney	Oppose Tax on Retirement Income	Resolves that the Illinois House of Representatives states its belief that the Illinois Income Tax Act should not be amended to permit taxing retirement income.	Identical to SR 127 (Sen. T. Cullerton)	House Assigned to Income Tax Subcommittee on 2/28/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=32&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=114482&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=32&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=114482&amp;SessionID=108&amp;GA=101</a>
HR 117	Rep. Skillicorn	Oppose Educational Pension Cost Shift	Resolves, by the Illinois House of Representatives, that the normal cost of pensions for state educators is the responsibility of the state and that the General Assembly should not use the current budget crisis as a reason to shift its financial responsibility for state pension costs to local taxpayers.	Similar to HR 27 (Rep. McSweeney)	House Referred to Rules Committee on 2/19/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=117&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=118783&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=117&amp;GAID=15&amp;DocTypeID=HR&amp;LegId=118783&amp;SessionID=108&amp;GA=101</a>

100th General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HR 343	Rep. Hernandez	Urge Divestment from For-Profit Companies that Contract to Shelter Migrant Children	Resolves, by the Illinois House of Representatives, that the State of Illinois is urged to divest from any for-profit companies that contract to shelter migrant children. Resolves that suitable copies of the resolution be delivered to the Illinois State Board of Investment, the State Universities Retirement System, the Teachers' Retirement System, and the Office of the Governor.		Resolution Adopted in the House on 5/30/19	<a href="http://www.ilga.gov/legislation/BillStatus.asp?DocNum=0343&amp;GAID=15&amp;DocTypeID=HR&amp;LegID=121330&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101">http://www.ilga.gov/legislation/BillStatus.asp?DocNum=0343&amp;GAID=15&amp;DocTypeID=HR&amp;LegID=121330&amp;SessionID=108&amp;SpecSess=&amp;Session=&amp;GA=101</a>
SR 127	Sen. T. Cullerton	Oppose Tax on Retirement Income	Resolves that the Illinois Senate states its belief that the Illinois Income Tax Act should not be amended to permit taxing retirement income.	Identical to HR 32 (Rep. McSweeney)	Senate Referred to Assignments Committee on 2/20/19	<a href="http://ilga.gov/legislation/BillStatus.asp?DocNum=127&amp;GAID=15&amp;DocTypeID=SR&amp;LegID=120447&amp;SessionID=108&amp;GA=101">http://ilga.gov/legislation/BillStatus.asp?DocNum=127&amp;GAID=15&amp;DocTypeID=SR&amp;LegID=120447&amp;SessionID=108&amp;GA=101</a>

## Spring Session 2019

### Fiscal Year 2020 Budget

#### Senate Bill 262 – Fiscal Year 2020 Budget

##### **Sponsors – Senator John J. Cullerton and Representative Gregory Harris**

SB 262 contains the Fiscal Year 2020 Budget. It appropriates \$1,854,692,000 for the state contribution to SURS for FY 2020. Of this amount, \$1,639,692,000 comes from the General Revenue Fund and \$215,000,000 comes from the State Pensions Fund. The FY 2020 certified state contribution to SURS is \$1,854,692,000. SB 262 appropriates an amount that is equal to the certified state contribution to SURS for FY 2020.

SB 262 also appropriates \$4,431,113 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the state contribution to the College Insurance Program for FY 2020. The College Insurance Program (CIP) provides healthcare for community college retirees. The FY 2020 certified state contribution to the College Insurance Program (CIP) is \$4,431,113. SB 262 appropriates an amount that is equal to the certified contribution to CIP for FY 2020.

Finally, SB 262 appropriates \$177,500 for the Governor's salary for FY 2020. This information is relevant for the calculations under the Governor's salary rule (40 ILCS 5/15-155(j-5)), which requires employers to pay the employer normal cost on the portion of an employee's earnings in excess of the Governor's salary. This amount is equal to the amount of the Governor's salary for FY 2019.

The appropriations to SURS SB 262 take effect on July 1, 2019.

**Status: Passed Both Houses on 6/1/19 (Senate: 40-19-0; House: 83-35-0).**

#### Senate Bill 1814 – Fiscal Year 2020 Budget Implementation Bill

##### **Sponsors – Senator David Koehler and Representative Gregory Harris**

SB 1814 creates the FY 2020 Budget Implementation Act to make changes in State programs that are necessary to implement the State budget for Fiscal Year 2020. It authorizes the use of moneys in the State Pensions Fund as part of the FY 2020 State contribution to SURS and makes two additional changes: (1) it repeals the 3% rule and re-enacts the 6% rule; and (2)

it extends the existing accelerated pension benefit payment options for three years (from June 30, 2021 to June 30, 2024).

#### Repeal 3% Rule and Re-Enact 6% Rule

SB 1814 amends the State Universities Retirement System and Teachers' Retirement System articles of the Illinois Pension Code to repeal the requirement that employers pay the present value of the resulting increase in benefits attributable to the portion of any salary increases in excess of 3 percent during the participant's final rate of earnings period. Instead, SB 1814 requires employers to pay the present value of the resulting increase in benefits attributable to the portion of any salary increases in excess of 6 percent during the participant's final rate of earnings period. (The 3% rule became effective for academic years on or after July 1, 2018, with the exception of salary increases under contracts and collective bargaining agreements entered into, amended, or renewed before June 4, 2018.)

For members who first became members of SURS (or a reciprocal retirement system) before January 1, 2011 (Tier I members), the final rate of earnings is the four consecutive academic years of employment in which earnings are the highest (or the final 48 months of employment for certain employees). For members who first become members of SURS on or after January 1, 2011 (Tier II members), the final rate of earnings is the eight consecutive academic years of employment out of the last 10 academic years of employment in which earnings are the highest (or the 96 consecutive months of employment out of the last 120 months of employment in which earnings are the highest for certain employees).

#### Extension of Accelerated Pension Benefit Payment Options

The accelerated pension benefit payment options created by Public Act 100-587 are scheduled to expire on June 30, 2021. These voluntary options allow Tier 1 and Tier 2 vested, inactive members to receive an accelerated pension benefit payment in lieu of any pension benefit from SURS and Tier 1 members to receive an accelerated pension benefit payment in exchange for reduced and delayed automatic annual increases in retirement and survivor annuities. SB 1814 extends these accelerated pension benefit payment options until June 30, 2024 and makes similar changes to accelerated pension benefit payment options under the State Employees' Retirement System and Teachers' Retirement System.

SB 1814 also makes other changes.

#### Effective Date

SB 1814 takes effect immediately upon becoming law.

**Status: Passed Both Houses on 6/2/19 (Senate: 52-6-0; House: 97-17-1).**

## **Bills Passed Both Houses**

### **House Bill 2029 – Vested Inactive Buyout – Health Insurance Preservation** **Sponsors – Representative Mark L. Walker and Senator Omar Aquino**

HB 2029 amends the State Employees Group Insurance Act of 1971 to ensure that members who take the Vested Inactive Buyout on or after June 4, 2018 under the State Employees' Retirement System (SERS), State Universities Retirement System (SURS), and Teachers' Retirement System (TRS) preserve any applicable retiree and survivor health insurance benefits upon receipt of the buyout payment.

Public Act 100-587 created two buyout options for eligible members of the three state-funded retirement systems (SERS, SURS, and TRS): (1) a buyout of pension benefits for vested, inactive members; and (2) a partial buyout of automatic annual increases for Tier I members at retirement. The Vested, Inactive Buyout (or VIB) is a lump-sum payment equal to 60 percent of the present value of the member's pension benefits, in exchange for the member forfeiting all accrued rights and credits under the System. The Tier I AAI Buyout (or AAI Buyout) is a lump-sum payment equal to 70 percent of the difference between the present value of Tier I automatic annual increases and the present value of reduced and delayed automatic annual increases, in exchange for the member receiving reduced and delayed automatic annual increases on retirement and survivor annuities.

Public Act 100-587 amended the definition of an "annuitant" under the State Employees Group Insurance Program to ensure that members who take the Vested Inactive Buyout will receive health insurance benefits upon meeting the age and service credit requirements for retirement, if they are eligible to participate in the State Employees Group Insurance Program. However, Public Act 100-587 failed to amend the definitions of "survivor" under the State Employees Group Insurance Program, "community college benefit recipient" under the College Insurance Program, and "TRS benefit recipient" under the Teachers Retiree Health Insurance Program to clarify that survivors of members in the State Employees Group Insurance Program, as well as members and survivors who are eligible to participate in the College Insurance Program and the Teachers Retiree Health Insurance Program, will receive health insurance benefits once the member meets the age and service credit requirements for retirement.

HB 2029 amends the definitions of "survivor" under the State Employees Group Insurance Program, "community college benefit recipient" under the College Insurance Program, and "TRS benefit recipient" under the Teachers Retiree Health Insurance Program to ensure that all members who elect the Vested Inactive Buyout, as well as their eligible survivors, will

receive any applicable health insurance benefits upon the member meeting the age and service credit requirements for retirement.

HB 2029 takes effect immediately upon becoming law.

**Status: Passed Both Houses on 5/29/19 (House: 116-0-0; Senate: 56-0-0).**

### **House Bill 2460 – Illinois Sustainable Investing Act**

**Sponsors – Representative William Davis and Senator Iris Y. Martinez**

HB 2460 requires every retirement system, pension fund, or investment board subject to the Illinois Pension Code to adopt a written investment policy and file a copy of that policy with the Department of Insurance within 30 days after its adoption. The investment policy must include material, relevant, and decision-useful sustainability factors to be considered by the board, within the bounds of financial and fiduciary prudence, in evaluating investment decisions, including, but not limited to: (1) corporate governance and leadership factors; (2) environmental factors; (3) social capital factors; (4) human capital factors; and (5) business model and innovation factors, as provided under the Illinois Sustainable Investing Act. Whenever a board changes its investment policy, it must file a copy of the new policy with the Department of Insurance within 30 days.

HB 2460 also creates the Illinois Sustainable Investing Act, which describes sustainability factors as including, but not limited to, the following:

- Corporate governance and leadership factors, such as the independence of boards and auditors, the expertise and competence of corporate boards and executives, systemic risk management practices, executive compensation structures, transparency and reporting, leadership diversity, regulatory and legal compliance, shareholder rights, and ethical conduct.
- Environmental factors that may have an adverse or positive financial impact on investment performance, such as greenhouse gas emissions, air quality, energy management, water and wastewater management, waste and hazardous materials management, and ecological impacts.
- Social capital factors that impact relationships with key outside parties, such as customers, local communities, the public, and the government, which may impact investment performance. Social capital factors include human rights, customer welfare, customer privacy, data security, access and affordability, selling practices and product labeling, community reinvestment, and community relations.
- Human capital factors that recognize that the workforce is an important asset to delivering long-term value, including factors such as labor practices, responsible

contractor and responsible bidder policies, employee health and safety, employee engagement, diversity and inclusion, and incentives and compensation; and

- Business model and innovation factors that reflect an ability to plan and forecast opportunities and risks, and whether a company can create long-term shareholder value, including factors such as supply chain management, materials sourcing and efficiency, business model resilience, product design and life cycle management, and physical impacts of climate change.

HB 2460 also makes other changes.

HB 2460 takes effect in accordance with the Effective Date of Laws Act.

**Status: Passed Both Houses on 5/29/19 (House: 73-42-0; Senate: 37-19-0).**

### **Senate Bill 75 – Workplace Protections Omnibus**

**Sponsors – Senator Melinda Bush and Representative Ann M. Williams**

SB 75 contains several provisions designed to provide employee protections in the workplace. These include: protections against discrimination and harassment (including the rights of complainants); protections against non-disclosure clauses; annual training to prevent discrimination and harassment; the right to employment leave due to incidents of sexual violence and gender violence; and the annual reporting of certain settlements and adverse judgments and administrative rulings by employers to the Illinois Department of Human Rights.

Of these provisions, as it relates to SURS, SB 75 modifies the anti-sexual harassment training completed annually by SURS trustees and staff under the State Officials and Employees Ethics Act to encompass other types of harassment and discrimination. Beginning in 2020, each officer, member, and employee must annually complete a harassment and discrimination preventing training program. A person who fills a vacancy in an elective or appointed position must complete his or her initial training within 30 days after commencement of his or her office or employment. The training must include: (1) definitions, descriptions, and examples of sexual harassment, unlawful discrimination, and harassment; (2) details on how an individual can report allegations of sexual harassment, unlawful discrimination, and harassment, including options for making a confidential report to a supervisor, ethics officer, Inspector General, or the Department of Human Rights; (3) definitions, descriptions, and examples of retaliation for reporting sexual harassment, unlawful discrimination, and harassment allegations, including the availability of whistleblower protections under the Act, the Whistleblower Act, and the Illinois Human Rights Act; and (4) the consequences of a violation of the prohibition on sexual harassment, unlawful discrimination, and harassment and the consequences for knowingly making a false report. Proof of completion of the training must be submitted to the applicable ethics officer

and the anti-harassment and discrimination training programs must be overseen by the appropriate Ethics Commission and Inspector General under the Act. (SB 75 also requires lobbyists registered with the Illinois Secretary of State to complete a similar annual training beginning in 2020.)

SB 75 also makes other changes.

SB 75 takes effect on January 1, 2020, except that provisions regarding discrimination and harassment prevention training and complainants' rights take effect immediately upon becoming law.

**Status: Passed Both Houses on 6/2/19 (Senate: 59-0-0; House: 114-0-0).**

**Senate Bill 1264 – RUUPA – Trailer Bill for Public Retirement Systems  
Sponsors – Senator Omar Aquino and Representative Robert Martwick**

SB 1264 amends the Revised Uniform Unclaimed Property Act to ensure that annuity, pension, and benefit funds held in a fiduciary capacity by or on behalf of a retirement system, pension fund, or investment board under the Illinois Pension Code remain in their respective trusts. SB 1264 also requires pension funds, retirement systems, and investment boards created pursuant to Articles 3, 4, and 22 of the Illinois Pension Code to adhere to certain compliance requirements regarding best practices to locate owners of unclaimed property.

Public retirement systems were previously exempt from the Uniform Distribution of Unclaimed Property Act. However, this exemption did not carry over to the newly created Revised Uniform Unclaimed Property Act, which became effective on January 1, 2018. As a result, under current law, public retirement systems face conflicting requirements under IRS rules and regulations and the new Revised Uniform Unclaimed Property Act. SB 1264 represents a compromise between public retirement systems and the state treasurer's office on the administration of the Revised Uniform Unclaimed Property Act.

Specifically, as it relates to SURS, SB 1264 requires each public retirement system to report the following information by November 1<sup>st</sup> of each year to the state treasurer's office about property presumed abandoned in an annuity, pension, or benefit fund held in a fiduciary capacity by or on behalf of that public retirement system: (1) the name of the owner and names of any beneficiaries; (2) the last known address, if known; (3) the Social Security number or taxpayer identification number, if known or readily ascertainable; and (4) the dollar amount. SB 1264 prohibits the payment or delivery of any annuity, pension, or benefit funds held in a fiduciary capacity by or on behalf of a public retirement system to the state treasurer's office. In this manner, SB 1264 allows each public retirement system to keep its assets in its respective trust, while simultaneously enabling the state treasurer's office to assist in reuniting owners with their unclaimed property.

The provisions of SB 1264 (except for the reporting requirements and the additional compliance provisions for Article 3, 4, and 22 pension funds, retirement systems, and investment boards) apply retroactively to January 1, 2018 (the effective date of the Revised Uniform Unclaimed Property Act).

SB 1264 takes effect in accordance with the Effective Date of Laws Act.

**Status: Passed Both Houses on 5/31/19 (Senate: 58-0-1; House: 106-0-0).**

### **Senate Bill 1265 – SURS Technical Corrections Bill**

**Sponsors – Senator Omar Aquino and Representative Robert Martwick**

SB 1265 is an initiative of SURS that makes three technical changes under Article 15 of the Illinois Pension Code.

First, SB 1265 amends the definition of an “employee” under Section 15-107 to mirror a change to the definition of an “employer” under Section 15-106 by Public Act 100-0611 (which allowed certain legacy employees within the newly created Department of Innovation and Technology to continue to participate in SURS). In this manner, SB 1265 ensures consistency between the definitions of “employee” and “employer” under SURS.

Second, SB 1265 amends the definition of “basic compensation” under Section 15-110 to account for the creation of the optional, supplemental defined contribution plan (457 plan) in SURS under Public Act 100-0769. By treating employee contributions to the optional, supplemental defined contribution plan (457 plan) as part of basic compensation, SB 1265 maintains consistency with the treatment of employee contributions to the state’s Deferred Compensation Plan (457 plan) which are also treated as part of basic compensation. In this manner, SB 1265 ensures that employees are not penalized for making contributions to the optional, supplemental defined contribution plan in SURS.

Third, SB 1265 corrects a drafting error in Section 15-145. Under Section 15-131, an unmarried disabled child is considered a “survivor” for benefit purposes if his or her mental or physical disability began prior to the age of 18. The same section provides that an unmarried, non-disabled child is considered a “survivor” for benefit purposes if he or she is less 18 years of age or is less than 22 years of age and a full-time student. Under current law, the language in Section 15-145 conflicts with the definition of a “survivor” under Section 15-131. By correcting the drafting error in Section 15-145, SB 1265 maintains consistency between the section and the definition of a “survivor” under SURS and reflects SURS’ longstanding interpretation and administration of survivor benefits under the Illinois Pension Code.

SB 1265 takes effect immediately upon becoming law.

**Status: Passed Both Houses on 5/21/19 (Senate: 55-0-0; House: 116-0-0).**

## **Resolutions**

### **House Joint Resolution 16 - State Sponsored Health Clinic Task Force**

#### **Sponsors - Representative Mike Murphy**

HJR 16 resolves by the Illinois House of Representatives, with concurrence of the Illinois Senate, that the state-sponsored Health Clinic Task Force is created to study the possibility of implementing a state of Illinois sponsored health clinic for state employees, dependents, and retirees, with the purpose of providing quality care and annual savings to the state's overall group insurance costs.

HJR 16 resolves that the Task Force be comprised of the following members, to serve without compensation: (1) two individuals appointed by the Speaker of the Illinois House of Representatives; (2) two individuals appointed by the Minority Leader of the Illinois House of Representatives; (3) two individuals appointed by the President of the Illinois Senate; (4) two individuals appointed by the Minority Leader of the Illinois Senate; (5) one individual appointed by the governor of Illinois; and (6) one individual appointed by the president/director of a union representing the largest amount of state employees.

HJR 16 resolves that the Department of Central Management Services provide administrative support for the Task Force and that the Task Force submit its final report to the General Assembly no later than December 31, 2019, at which time the Task Force is dissolved.

HJR 16 resolves that suitable copies of the resolution be delivered to the director of the Illinois Department of Central Management Services, the Speaker of the Illinois House of Representatives, the Minority Leader of the Illinois House of Representatives, the President of the Illinois Senate, the Minority Leader of the Illinois Senate, the governor of Illinois, and the president/director of a union representing the largest amount of state employees.

**Status: Resolution Adopted in Both Houses on 5/31/19 (House: 113-0-0; Senate: 50-1-0).**

### **House Resolution 6 - Urge Solution to Windfall Elimination Provision**

#### **Sponsors - Representative Mary E. Flowers**

HR 6 resolves that the Illinois House of Representatives urges President Trump and the United States Congress to continue to work to find a solution to the problems created by the Windfall Elimination Provision.

HR 6 resolves that suitable copies of the resolution be delivered to President Trump, U.S. Senate Majority Leader McConnell, U.S. Senate Minority Leader Schumer, U.S. Speaker of the House Pelosi, U.S. House of Representatives Minority Leader McCarthy, and all members of the Illinois Congressional Delegation.

The Windfall Elimination Provision is a provision of federal law that requires federal Social Security benefits to be offset in order to account for pension benefits provided by the state.

**Status: Resolution Adopted in the House on 5/15/19.**

**[House Resolution 343](#) - Urge Divestment from For-Profit Companies that Contract to Shelter Migrant Children**

**Sponsors - Representative Elizabeth Hernandez**

HR 343 resolves, by the Illinois House of Representatives, that the State of Illinois is urged to divest from any for-profit companies that contract to shelter migrant children.

HR 343 further resolves that suitable copies of the resolution be delivered to the Illinois State Board of Investment, the State Universities Retirement System, the Teachers' Retirement System, and the Office of the Governor.

**Status: Resolution Adopted in the House on 5/30/19.**