



MINUTES

**Meeting of the Legal & Legislative Committee
of the Board of Trustees of the
State Universities Retirement System
Friday, March 13, 2020, 12:00 p.m.
State Universities Retirement System
Main Conference Room
1901 Fox Dr., Champaign, IL**

The meeting of the Legal & Legislative Committee of the Board of Trustees of the State Universities Retirement System convened on March 13, 2020, at 12:00 p.m. in the System's Champaign office located at 1901 Fox Dr. with a video conference location at the System's Naperville office at 1120 E. Diehl Road, Naperville, IL.

The following trustees were present: Dr. Fred Giertz, Dr. Steven Rock, Mr. Collin Van Meter, Mr. Scott Hendrie, Mr. John Atkinson (via video conference), Mr. John Lyons (via video conference), Mr. Mitch Vogel (via video conference), Ms. Jamie-Clare Flaherty (via conference call) and Mr. Antonio Vasquez (via conference call).

Others present: Mr. Martin Noven, Executive Director; Mr. Doug Wesley, Chief Investment Officer (CIO); Ms. Bianca Green, General Counsel; Ms. Ellen Hung, Deputy CIO; Ms. Brenda Dunn, Chief Human Resource Officer; Ms. Jackie Hohn, Chief Internal Auditor, Ms. Suzanne Mayer, Chief Benefits Officer, Ms. Tara Myers, Chief Financial Officer, Mr. Albert Lee, Associate General Counsel; Ms. Kristen Houch, Head of Legislative Affairs; Ms. Kelly Carson, Ms. Chelsea McCarty and Ms. Annette Ackerman, Executive Assistants; Mr. Steve Zahn of Zahn Governmental Solutions (via video conference); and Mr. Timothy Spila.

Legal & Legislative Committee roll call attendance was taken. Trustee Ammons, absent; Trustee Flaherty, present; Trustee Giertz, present; Trustee Rock, present; and Trustee Lyons, present.

APPROVAL OF MINUTES

Chairman Rock presented the minutes from the Legal & Legislative Committee meetings of September 13, 2019, and December 5, 2019.

Trustee Giertz made the following motion:

- That the minutes from the September 13, 2019 and December 5, 2019 Legal & Legislative Committee meetings be approved as presented.

Trustee Jamie-Clare Flaherty seconded and the motion carried with all trustees present voting in favor.

CLOSED SESSION MINUTES

Chairman Steven Rock presented the closed minutes from the December 5, 2019 meeting.

Trustee Giertz made the following motion:

- That the closed meeting minutes from the December 5, 2019 meeting be approved and remain closed.

Trustee Jamie-Clare Flaherty seconded and the motion carried with all trustees present voting in favor.

CHAIRPERSON'S REPORT

Trustee Rock did not have a formal chairperson's report.

LEGISLATIVE UPDATE

Ms. Houch, and Mr. Zahn provided the legislative update. Ms. Houch reviewed the governor's FY2021 budget that was introduced on February 19, 2020. Ms. Houch further highlighted the status of bills that have been filed and are currently moving through the General Assembly. Discussions continued as Ms. Houch and Mr. Zahn addressed questions raised by the trustees.

Copies of the reports titled "March 2020 Legislative Update" and "Master Bill Summary Report March 2020" are incorporated as part of these minutes as [Exhibit 1](#) and [Exhibit 2](#).

RULEMAKING AND COMPLIANCE UPDATES

Status of Pending Rules

Mr. Lee updated the group on the status of rulemaking approved by the board in January 2020. The proposed rules make changes and/or create new administrative rules on the following topics: Employer Contributions for Employing Affected Annuitants, Full-Time Student Survivors Insurance Beneficiaries, Effective Beneficiary Designations, Vested Inactive Buyout and AAI Buyout Rules and Miscellaneous Grammatical and Typographical Corrections. The proposed rulemakings have concluded the pre-draft review process with the Joint Committee on Administrative Rules (JCAR) and are with the Secretary of State's Office. After publication in the Illinois Register the proposed rulemakings will be opened to the public for comment.

A copy of the staff memo titled "Rulemaking Update" is incorporated as part of these minutes as [Exhibit 3](#).

Compliance Stop Light Report

Ms. Green reviewed and discussed the updated compliance stop light report which reflects SURS' compliance with its reporting requirements.

Copies of the report titled “February 2020 Compliance Stop Light Report” is incorporated as part of these minutes as [Exhibit 4](#).

PUBLIC COMMENT

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

Trustee Giertz made the motion to adjourn.

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

Respectfully submitted,

A handwritten signature in black ink, appearing to read "M. Noven", with a long horizontal flourish extending to the right.

Mr. Martin Noven
Secretary, Board of Trustees

MMN:aa

Spring Session 2020

Recent Laws

Senate Bill 1300 – Downstate and Suburban Police/Fire Investment Consolidation

Sponsors – Senator Cristina Castro and Representative Jay Hoffman

SB 1300 consolidates the investments of downstate and suburban police and firefighter's pension funds into the Police Officers' Public Investment Fund and the Firefighters' Public Investment Fund, respectively.

As it relates to SURS, SB 1300 makes three changes: it allows Tier 2 police officers and firefighters to retire at age 60; it requires the Governor to designate the SURS Chairperson; and it makes a technical change related to the accelerated pension benefit payment option for Tier 1 and Tier 2 vested, inactive members.

SB 1300 takes effect on January 1, 2020.

Status: Governor Pritzker signed into law on December 18, 2019 as Public Act 101-0610.

Senate Bill 1639 – Governmental Ethics Reforms

Sponsors – Senator Heather A. Steans and Representative Gregory Harris

SB 1639 amends the Illinois Lobbyist Registration Act to require additional disclosures from lobbyists. Additionally, within 90 days after the effective date of the legislation, SB 1639 requires the Secretary of State to create a publicly accessible and searchable database with disclosures made by registered lobbyists under the Lobbyist Registration Act, contributions made by registered lobbyists that are required to be disclosed under the Election Code, and statements of economic interests required to be filed by State officials and employees under the Illinois Governmental Ethics Act.

SB 1639 takes effect immediately upon becoming law.

Status: Governor Pritzker signed into law on December 5, 2019 as Public Act 101-0595.

Senate Bill 1784 – Post-Janus Employee Labor Union Protections
Sponsors – Senator Don Harmon and Representative Jay Hoffman

SB 1784 amends the Illinois Pension Code to generally prohibit the disclosure of certain information related to membership status in a labor organization or other voluntary association affiliated with a labor organization or labor federation. However, this prohibition does not apply to disclosures (1) required under the Freedom of Information Act, (2) for purposes of conducting public operations or business, or (3) to a labor organization or other voluntary association affiliated with a labor organization or labor federation.

SB 1784 further amends the Freedom of Information Act to exempt the information prohibited from disclosure under the Illinois Pension Code from inspection and copying under the Freedom of Information Act.

SB 1784 takes effect immediately upon becoming law.

Status: Governor Pritzker signed into law on December 20, 2019 as Public Act 101-0620.

Resolutions Adopted

House Joint Resolution 93 – Joint Commission on Ethics and Lobbying Reform
Sponsors – Representative Gregory Harris and Senator Cristina Castro

HJR 93 resolves that the Joint Commission on Ethics and Lobbying Reform is created to:

- (1) Review best practices concerning governmental ethics from local governments and other states;
- (2) Seek input from experts and the general public concerning proposals to improve governmental ethics; and
- (3) Review and make recommendations for changes to the State Officials and Employees Ethics Act, the Illinois Governmental Ethics Act, the Lobbyist Registration Act, the Public Officers Prohibited Activities Act, and Article 50 of the Illinois Procurement Code to improve public trust in government.

Under HJR 93, the Joint Commission consists of 16 members appointed by the Leadership of the Illinois General Assembly, Illinois Attorney General, Illinois Secretary of State, and the Governor of Illinois.

Finally, while HJR 93 permits the issuance of interim reports, the Joint Commission must issue a final report on its review and recommendations by March 31, 2020 to the General Assembly, the Governor, the Attorney General, the Treasurer, the Comptroller, and the Secretary of State.

Status: Adopted in Both Houses on 11/14/2019 (House: 111-4-0; Senate: 32-18-0).

House Bills

House Bill 3988 – Governmental Ethics Reforms

Sponsors – Representative Allen Skillicorn

HB 3988 amends the Illinois Governmental Ethics Act to create a uniform statement of economic interests beginning with statements filed on and after the effective date of the legislation. Information included in the uniform economic statement will include:

- (1) Each asset with a value in excess of \$5,000;
- (2) Each source of income in excess of \$1,200 and the transaction dates for assets that generated more than \$5,000 in capital gains when sold or transferred;
- (3) Each creditor of a debt in excess of \$5,000;
- (4) Each debtor of a debt in excess of \$5,000;
- (5) The name of each unit of local government of which the filer was an employee, contractor, or office holder;
- (6) Each person known to the filer to be a registered lobbyist with any unit of government and with whom the filer has an economic or familial relationship; and
- (7) Each source and type of gift or honorarium valued in excess of \$500.

Additionally, within 90 days after the effective date of the legislation, HB 3988 requires the Secretary of State to create a publicly accessible and searchable database with disclosures made by registered lobbyists under the Lobbyist Registration Act, contributions made by registered lobbyists that are required to be disclosed under the Election Code, and statements of economic interests required to be filed by State officials and employees under the Illinois Governmental Ethics Act.

HB 3988 takes effect immediately upon becoming law.

HB 3988 is nearly identical to HA #2 to SB 1639 and similar to HB 4618 and SB 3318 of the 101st General Assembly.

Status: House Referred to Rules Committee on 1/8/2020.

House Bill 3990 – Actuary Bonds

Sponsors – Representative Allen Skillicorn

HB 3990 amends the Regulation of Public Pension Funds article of the Illinois Pension Code to require each actuary that prepares an actuarial statement for a pension fund or retirement system to post a bond of \$2 billion.

HB 3990 takes effect in accordance with the Effective Date of Laws Act.

Status: House Referred to Rules Committee on 1/8/2020.

House Bill 4036 – SEGIP Define Qualifying Change in Status

Sponsors – Representative Sue Scherer

HA #1 to HB 4036 re-inserts the provisions of the original legislation with technical changes. It also requires any request to elect dependent coverage due to a qualifying change in status to be consistent with the change in status experienced by the member.

As introduced, HB 4036 amends the State Employees Group Insurance Act of 1971 to expressly define the phrase “qualifying change in status” with language from IRS rules and regulations. A qualifying change in status includes: (1) changes to an employee’s legal marital status; (2) changes to an employee’s number of dependents; (3) changes to the employment status of the employee, spouse, or dependent; (4) changes to the eligibility requirements of an employee’s dependent; and (5) changes to the residence of the employee, spouse, or dependent.

Under current law, an employee may make benefit elections outside of initial eligibility, special enrollment, special circumstances as defined by the Department of Central Management Services, or during the annual Benefit Choice Period, if he or she incurs a qualifying change in status.

HB 4036 takes effect immediately upon becoming law.

Status: House Assigned to Personnel and Pensions Committee on 2/18/2020.

House Bill 4076 – No New Elected Officials Participate in Public Pensions

Sponsors – Representative John M. Cabello

HB 4076 amends the General Provisions article of the Illinois Pension Code to prohibit a person from participating in a pension fund or retirement system with respect to an elected position to which the person was first elected or appointed on or after the effective date of the legislation.

HB 4076 takes effect immediately upon becoming law.

HB 4076 is identical to HB 2592 of the 101st General Assembly.

Status: House Referred to Rules Committee on 1/16/2020.

House Bill 4090 – Unbalanced Budget Response Act

Sponsors – Representative Allen Skillicorn

HB 4090 creates the Unbalanced Budget Response Act, which gives the Governor certain emergency powers to balance the State budget.

Specifically, HB 4090 authorizes the Governor to delay payments under any statutory continuing appropriation (except for payments of debt service) for Fiscal Years 2021 and 2022 and allows delayed payments to be paid out of the next fiscal year's appropriation.

Additionally, HB 4090 authorizes the Governor to transfer an amount from any fund held by the Treasurer to any general fund held by the Treasurer, except that no transfer may be made out of: (1) any federal trust fund; (2) amounts for the payment of debt service; (3) amounts held in investments or cash by the state-funded retirement systems; or (4) the Road Fund.

Finally, the Governor may also modify statutory transfers out of any fund held by the Treasurer, except for statutory transfers out of a general fund: (1) for the payment of debt service; and (2) to the Road Fund.

HB 4090 takes effect immediately upon becoming law.

Status: House Referred to Rules Committee on 1/16/2020.

House Bill 4091 – SURS Employer Normal Cost Shift

Sponsors – Representative Allen Skillicorn

HB 4091 requires the actual employer to pay the employer normal cost for its employees in SURS beginning on the effective date of the legislation.

Specifically, HB 4091 amends the State Universities Retirement System's article of the Illinois Pension Code to require the actual employer of a participating employee to contribute the employer normal cost for that employee. The employer normal cost must be paid to SURS on a payroll-by-payroll basis, using the percentage of earnings determined on a System-wide basis and certified by SURS to all employers for use in the applicable fiscal year.

HB 4091 further requires the SURS Board of Trustees, as soon as possible after the effective date of the legislation, to recalculate and recertify the required State contribution to SURS for the current fiscal year, taking into account the actual-employer normal-cost contributions required by the legislation.

HB 4091 takes effect immediately upon becoming law.

Status: House Referred to Rules Committee on 1/16/2020.

House Bill 4114 – New Revenues Fund State Pension Obligations

Sponsors – Representative Charles Meier

HB 4114 amends the State Budget Law of the Civil Administrative Code of Illinois to require the state to allocate any new and additional revenue sources to fund its pension obligations.

Specifically, HB 4114 requires the state of Illinois to allocate any new and additional revenue sources that exceed the fiscal year 2020 revenue forecasts reported by the Commission on Government Forecasting and Accountability in 2019 towards the payment of current and continuing pension obligations. New and additional revenue sources include, but are 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.

HB 4114 takes effect immediately upon becoming law.

HB 4114 is nearly identical to HB 2394 of the 101st General Assembly.

Status: House Referred to Rules Committee on 1/16/2020.

House Bill 4117 – Hydraulic Fracturing Tax Revenues Fund Pensions

Sponsors – Representative Charles Meier

HB 4117 amends the Illinois Hydraulic Fracturing Tax Act to require all moneys received by the Illinois Department of Revenue under the Act to be used only for the payment of pension obligations of the state of Illinois.

HB 4117 takes effect immediately upon becoming law.

HB 4117 is identical to HB 2054 of the 101st General Assembly.

Status: House Referred to Rules Committee on 1/16/2020.

House Bill 4260 – BEP – Descendant of American Slavery

Sponsors – Representative Nicholas K. Smith

HB 4260 amends the State Employment Records Act to require State agencies, as defined under the Illinois State Auditing Act, to include information regarding employees who are Descendants of American Slavery in reports required under the Act.

HB 4260 also amends the Business Enterprise for Minorities, Women, and Persons to modify the definition of a “minority person” to include Descendants of American Slavery.

HB 4260 defines a “Descendant of American Slaves” as a person having direct ancestral lineage to victims of chattel slavery in the United States of America. Terms such as “Black,” “African American,” or “American Descendant of Slavery” can be used in addition to “Descendant of American Slaves.”

HB 4260 takes effect in accordance with the Effective Date of Laws Act.

HB 4260 is similar to HB 4865 of the 101st General Assembly.

Status: House Assigned to State Government Administration Committee on 3/3/2020.

House Bill 4323 – SURS Trustee Status Clarification

Sponsors – Representative Kelly M. Burke

HB 4323 amends the State Universities Retirement System’s article of the Illinois Pension Code to clarify the intent of the General Assembly regarding a SURS trustee’s change in status.

Specifically, the SURS Board of Trustees consists of six elected trustees (four from participating employees and two from annuitants) and five appointed trustees. SURS' statute does not clearly indicate what happens when a trustee experiences a change in status (for example, a participating employee retires or an annuitant returns to work as a participating employee). As a result, SURS requested an opinion from the Attorney General's Office on the subject. In response to SURS' request, the Attorney General's Office indicated that the statute is "ambiguous" and recommended that "SURS pursue legislation to clarify the General Assembly's intent." HB 4323 seeks to establish the intent of the General Assembly regarding a SURS trustee's change in status. It also makes a technical change in terms from "active participant" to "participating employee," consistent with statute.

HB 4323 takes effect immediately upon becoming law.

Status: House Placed on Calendar Order of 2nd Reading on 3/5/2020.

House Bill 4464 – State Spending Limitation

Sponsors – Representative Allen Skillicorn

HB 4464 amends the State Finance Act to establish \$31.374 billion as the State spending limitation for fiscal years 2021 through 2028. HB 4464 provides that if State spending exceeds the limitation and the Governor is not presented with legislation to reduce State spending to an amount equal to or less than the limitation, then the Governor may designate amounts to be set aside as a reserve from amounts appropriated from the State general funds for all boards, commissions, agencies, institutions, authorities, colleges, universities, and bodies politic and corporate of the State.

HB 4464 also amends the General Obligation Bond Act to authorize the issuance of \$7 billion in bonds to pay vouchers incurred by the State prior to July 1, 2020.

HB 4464 takes effect immediately upon becoming law.

Status: House Referred to Rules Committee on 2/3/2020.

House Bill 4454 – Diversity, Inclusion, and Cultural Competence Training

Sponsors – Representative Lamont J. Robinson, Jr.

HB 4454 amends the State Officials and Employees Ethics Act to require each officer, member, and employee to annually complete a diversity, inclusion, and cultural competence training program, beginning January 1, 2021. The training must include, at a minimum, the following: (1) the definition and a description of diversity and inclusion beyond race and

gender, including, but not limited to, ethnicity, gender, sexual orientation, religion, generation, education, military status, marital status, physical, and mental abilities; (2) how values and assumptions about others impact decision-making, legislation, and social services; (3) how personal trigger words and the trigger words of others impact individuals; (4) what is unconscious bias and the most common types of unconscious biases; (5) how to best engage in personal awareness and awareness of other cultures; and (6) an overview of the Equal Employment Opportunity Commission. Proof of completion must be submitted to the applicable ethics officer, and the training program must be overseen by the appropriate Ethics Commission and Inspector General.

HB 4454 takes effect in accordance with the Effective Date of Laws Act.

Status: House Referred to Rules Committee on 2/3/2020.

House Bill 4483 – Statement of Economic Interests – Disclose Legal Representation before Government

Sponsors – Representative Deanne M. Mazzochi

HB 4483 amends the Illinois Governmental Ethics Act to require the statement of economic interests to include the disclosure of legal representation before any unit of local government or State agency. Specifically, the statement will provide for the disclosure of any appearance as legal representative of a client, including any such appearance by the law firm of the person filing or by anyone on behalf of the person filing, before any unit of local government or State agency, including, but not limited to: (1) a formal or informal proceeding involving an elected Assessor; (2) a zoning board, landmarks commission, liquor commission, gaming commission, or any other State, county, or municipal board regarding the same; (3) any board or hearing officer relating to property tax appeals; or (4) any entity awarding procurement contracts involving State funds in excess of \$100,000. The statement will also provide for the disclosure of: the date of retention by the client; all real parties in interest for the client; whether any fees will be paid on a contingency, flat fee, or hourly basis; and for property tax representations, each address and PIN number associated with the representation.

HB 4483 takes effect in accordance with the Effective Date of Laws Act.

Status: House Referred to Rules Committee on 2/4/2020.

House Bill 4580 – Open Meetings Act – Record Open Meetings

Sponsors – Representative Grant Wehrli

HB 4580 amends the Open Meetings Act to require each meeting that is required to be open to the public under the Act to be audio recorded by the public body and maintained by the public body for at least one year after the date of the meeting.

HB 4580 takes effect in accordance with the Effective Date of Laws Act.

Status: House Assigned to State Government Administration Committee on 3/12/2020.

House Bill 4594 – State-Funded Retirement Systems – Opt-Out
Sponsors – Representative Deanne M. Mazzochi

HB 4594 amends the State Universities Retirement System article of the Illinois Pension Code to establish that a person who first becomes an employee after the effective date of the legislation is not required to participate in the System. HB 4594 provides that an employee may elect not to participate in the System by notifying the System in writing no later than 30 days after first becoming an employee.

HB 4594 makes similar changes under the State Employees Retirement System and Teachers Retirement System articles of the Illinois Pension Code.

HB 4594 takes effect immediately upon becoming law.

Status: House Referred to Rules Committee on 2/5/2020.

House Bill 4618 – Governmental Ethics Reforms
Sponsors – Representative Anna Stava-Murray

HB 4618 amends the Illinois Governmental Ethics Act to create a uniform statement of economic interests beginning with statements filed in 2021. Information included in the uniform economic statement will include:

- (1) Each asset with a value in excess of \$5,000;
- (2) Each source of income in excess of \$1,200 and the transaction dates for assets that generated more than \$5,000 in capital gains when sold or transferred;
- (3) Each creditor of a debt in excess of \$5,000;
- (4) Each debtor of a debt in excess of \$5,000;
- (5) The name of each unit of local government of which the filer was an employee, contractor, or office holder;

- (6) Each person known to the filer to be a registered lobbyist with any unit of government and with whom the filer has an economic or familial relationship; and
- (7) Each source and type of gift or honorarium valued in excess of \$500.

HB 4618 takes effect in accordance with the Effective Date of Laws Act.

HB 4618 is nearly identical to SB 3318 and is similar to HA #2 to SB 1639 and HB 3988 of the 101st General Assembly.

Status: House Assigned to Executive Committee on 3/12/2020.

House Bill 4710 – BEP – Employee Qualifying Business

Sponsors – Representative Joe Sosnowski

HB 4710 amends the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to include an employee qualifying business as a minority-owned business, women-owned business, and business owned by a person with a disability under the Act.

HB 4710 defines an “employee qualifying business” as a business with 50 or more full-time employees that is not 51% owned by a minority person, woman, or person with a disability, but whose employees are comprised of, at a minimum: (1) 66% minority persons; (2) 66% women; (3) 66% persons with a disability; or (4) any combination of persons identified in items (1) through (3) that amounts to 66% or higher.

HB 4710 takes effect immediately upon becoming law.

Status: House Assigned to State Government Administration Committee on 3/12/2020.

House Bill 4712 – Supplemental Defined Contribution Plan

Sponsors – Representative Joe Sosnowski

HB 4712 amends multiple provisions of the Illinois Pension Code to create supplemental defined contribution plans for each of the state-funded retirement systems.

As it relates to SURS, HB 4712 requires the SURS Board of Trustees, within one year after the effective date of the legislation, 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. The plan must be designed as a qualified tax-deferred savings plan under the Internal Revenue Code of 1986, as

amended. The plan must exist and serve in addition to other retirement, pension, and benefit plans established under the Illinois Pension Code. All assets and income of the plan must be held in trust for the exclusive benefit of participants and their beneficiaries.

Tier I participants and Tier II participants who first became participants before the defined contribution plan was established must have the opportunity to voluntarily elect to enroll in the plan. Each Tier II participant who becomes a participant on or after the establishment of the defined contribution plan must 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.

The plan must be designed to enable participants to generate a stream of income to replace their pre-retirement income in retirement. The SURS Board of Trustees must establish a default investment option in which employees are automatically invested upon initial enrollment in the plan or upon re-enrollment in the plan and absent direction by the participant to the contrary. Such investment in a default investment option must be deemed to have been made by participant direction so long as the SURS Board of Trustees has provided reasonable notice and description of the default investment option and the participant's right to select other investment options.

The plan must provide a variety of options for distributions to participants and their beneficiaries and must meet the relevant requirements of the Internal Revenue Code of 1986, as amended. The manner and timing of benefit distributions must meet the distribution requirements of Section 401(a)(9) of the Internal Revenue Code of 1986, as amended. Distributions upon the death of the participant must meet the requirements of Section 401(a)(37) of the Internal Revenue Code of 1986, as amended.

HB 4712 takes effect immediately upon becoming law.

HB 4712 is nearly identical to HB 2740 of the 101st General Assembly.

Status: House Assigned to Personnel and Pensions Committee on 3/12/2020.

[House Bill 4808 - FOIA - Denial Index and Deposit of Funds](#)

Sponsors - Representative Blaine Wilhour

HB 4808 amends the Freedom of Information Act to require a public body to include an index with each denial of a request for public records and to set aside \$7,500 for each denied request until the review process has been completed or a final order has been entered.

HB 4808 requires the index to include: (1) a description of the nature of the contents of each document withheld, or each deletion from a released document; (2) the date on which each

document withheld was created; (3) each author and recipient of each document withheld; and (4) a statement of the exemption or exemptions claimed for each withheld document or each deletion in a released document.

HB 4808 further requires a public body denying a request for public records to place \$7,500 in an interest-bearing escrow account or other segregated account for each request denied. The deposited funds must remain in the account for 60 days after the date of the public body's final denial of a request, or, if a requester has sought review by the Public Access Counselor or filed an action in court, until the review process has been completed or a final order has been entered. If a determination is made that the public body improperly denied a request to inspect or copy a public record, the deposited funds must be awarded to the requester in addition to or as part of any other award.

HB 4808 also makes other changes.

HB 4808 takes effect in accordance with the Effective Date of Laws Act.

Status: House Referred to Rules Committee on 2/18/2020.

**House Bill 4809 – State Officials and Employees – Lobbyist Revolving Door
Sponsors – Representative Blaine Wilhour**

HB 4809 amends the State Officials and Employees Ethics Act to prohibit any of the following persons from registering as a lobbyist and engaging in lobbying with members of the General Assembly for 3 years immediately following termination of that person's most recent term of office: members of the General Assembly; persons whose appointment to office is subject to the advice and consent of the Senate; and heads of departments, commissions, boards, divisions, bureaus, authorities, or other administrative units within State government who take office on or after the effective date of the legislation.

HB 4809 takes effect immediately upon becoming law.

Status: House Referred to Rules Committee on 2/18/2020.

**House Bill 4865 – BEP – Descendants of American Slavery
Sponsors – Representative Kambium Buckner**

HB 4865 amends the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to modify the definition of a "minority person" to include Descendants of American Slavery. A "Descendant of American Slavery" is defined as a person having direct ancestral lineage to victims of slavery in the United States of America.

HB 4865 takes effect in accordance with the Effective Date of Laws Act.

HB 4865 is similar to HB 4260 of the 101st General Assembly.

Status: House Assigned to Agency Operation Subcommittee of the State Government Administration Committee on 3/4/2020.

House Bill 4944 – Veterans Benefits – Honorable Discharge

Sponsors – Representative Joyce Mason

HB 4944 amends the Statute on Statutes to establish that, in determining the meaning of any statute or rule or interpretation by the various administrative agencies of the State, for purposes of determining eligibility for any veterans benefit available from the State, the words “honorable discharge” and “honorably discharged” include a discharge under other than honorable conditions due to post-traumatic stress disorder, traumatic brain injury, status as a survivor of sexual assault or harassment, LGBTQ-related issues, or mental health issues, but do not include a bad conduct discharge or a dishonorable discharge.

HB 4944 takes effect in accordance with the Effective Date of Laws Act.

Status: House Assigned to Veterans Affairs Committee on 3/12/2020.

House Bill 5020 – FOIA – Format of Records

Sponsors – Representative Anne Stava-Murray

HB 5020 amends the Freedom of Information Act to require a public body to take all reasonable steps to provide records in a format that is readable by the requester, including, but not limited to, making the record available in any format that is available to the public body and requested by the requester.

HB 5020 takes effect immediately upon becoming law.

Status: House Assigned to Executive Committee on 3/12/2020.

House Bill 5021 – FOIA – No Fees for Certain Taxpayers

Sponsors – Representative Anne Stava-Murray

HB 5021 amends the Freedom of Information Act to prohibit a public body from charging a fee to a requester who is a taxpayer within the jurisdiction of the public body, unless the request is made for a commercial purpose.

HB 5021 takes effect immediately upon becoming law.

Status: House Assigned to Executive Committee on 3/12/2020.

House Bill 5022 – FOIA – Extension Requirements

Sponsors – Representative Stava-Murray

HB 5022 amends the Freedom of Information Act to allow the person making a request and the public body to agree in writing to extend the time for compliance for a period to be determined by the parties only after the public body has reviewed the request, determined that an extension is necessary, and provided notification of the reasons for the extension and the date by which the response will be forthcoming.

HB 5022 takes effect immediately upon becoming law.

Status: House Assigned to Executive Committee on 3/12/2020.

House Bill 5370 – Statement of Economic Interests – Additional Disclosures

Sponsors – Representative Blaine Wilhour

HB 5370 amends the Illinois Governmental Ethics Act to require the disclosure of additional information in annual statements of economic interests. Specifically, HB 5370 requires filers to disclose:

- (1) all businesses with which the person is associated;
- (2) all sources of income in excess of \$1,000;
- (3) the name of securities in excess of \$5,000;
- (4) any known blind trust and the names of the trustees;
- (5) all real property and its location;
- (6) creditors who are owed debts of more than \$10,000;
- (7) leases or contracts with the State held or entered into by the person or a business with which he or she is associated; and
- (8) a description of any partnership, joint ownership, or similar business affiliation between: a business that is associated with the person, the person's spouse, or a relative of the person and a person who is registered under the Lobbyist Registration Act or is doing business with or seeking to do business with the State.

HB 5370 takes effect in accordance with the Effective Date of Laws Act.

Status: House Referred to Rules Committee on 2/18/2020.

House Bill 5412 – Annuitant Database

Sponsors – Representative Grant Wehrli

HB 5412 creates an annuitant database within each of the five state-funded retirement systems.

Specifically, HB 5412 requires SURS to establish and post an annuitant database on its website by July 1, 2021. The annuitant database consists of 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. The annuitant database must be updated on a monthly basis. The annuitant database must not include the name of any annuitant under the age of 18 or any identifying information other than the annuitant's name and the amount of annuity paid to that annuitant each month. HB 5412 also makes similar changes to create annuitant databases under the General Assembly Retirement System, State Employees' Retirement System, Teachers' Retirement System, and Judges' Retirement System.

HB 5412 takes effect immediately upon becoming law.

HB 5412 is nearly identical to HB 3131 of the 101st General Assembly.

Status: House Referred to Rules Committee on 2/18/2020.

House Bill 5445 – Non-Tenured and Adjunct Faculty – State Benefits

Sponsors – Representative Nicholas K. Smith

HB 5445 amends multiple statutes to require the board of trustees of each public university and community college district to provide State benefits, including health insurance and pension benefits, for adjunct faculty teaching a combined 50% workload at any combination of public higher education institutions.

HB 5445 takes effect immediately upon becoming law.

HB 5445 is identical to SB 3766 of the 101st General Assembly.

Status: House Assigned to Appropriations - Higher Education Committee on 3/3/2020.

House Bill 5584 - Wire Transfer Tax

Sponsors - Representative Elizabeth Hernandez

HB 5584 creates the Wire Transfer Tax Act. Beginning on January 1, 2021, it imposes a tax of 1% of the amount transferred on each wire transfer originating from within Illinois. The tax must be collected and remitted to the Illinois Department of Revenue by the financial institution that facilitates the wire transfer. The tax is not imposed with respect to any transaction that may not be made the subject of taxation by the State pursuant to the United States Constitution and statutes. All moneys received from the tax must be deposited into the Illinois DREAM Fund, which provides post-secondary educational scholarships to the children of immigrants.

HB 5584 takes effect in accordance with the Effective Date of Laws Act.

Status: House Assigned to Revenue and Finance Committee on 3/12/2020.

House Bill 5687 - Governor's FY 2021 Introduced Budget

Sponsors - Representative Gregory Harris

HB 5687 appropriates \$1,995,767,000 to SURS for the annual required State contribution for FY 2021. Of this amount, \$1,780,767,000 comes from the General Revenue Fund, and \$215,000,000 comes from the State Pensions Fund. This amount is equal to the amount of the annual required State contribution certified by SURS for FY 2021.

HB 5687 appropriates \$7,282,374 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the State's contribution to the College Insurance Program ("CIP"), which provides health insurance benefits for community college retirees. This amount is \$2,619,601 greater than the certified contribution to CIP (\$4,662,773) for FY 2021.

HB 5687 appropriates \$37,560,255 from the General Revenue Fund to SURS for deposit into the Community College Health Insurance Security Fund for additional State contributions to CIP for FY 2021.

HB 5687 takes effect on July 1, 2020.

HB 5687 is identical to SB 3950 of the 101st General Assembly.

Status: House Referred to Rules Committee on 2/25/2020.

House Bill 5746 – FY 2020 Supplemental Budget

Sponsors – Representative Gregory Harris

HB 5746 appropriates \$50,000 from the General Revenue Fund to SURS for employer contributions required by the State as an employer in FY 2020. These contributions are required due to the collectively bargained back wages paid to participating employees at the Department of Innovation and Technology pursuant to Public Act 101-7.

HB 5746 takes effect immediately upon becoming law.

As it relates to SURS, HB 5746 is identical to SB 3922 of the 101st General Assembly.

Status: House Referred to Rules Committee on 2/25/2020.

House Bill 5755 – FY 2021 Governor’s Salary

Sponsors – Representative Gregory Harris

HB 5755 appropriates \$186,400 to the State Comptroller for the Governor’s salary for Fiscal Year 2021. The Governor’s salary for Fiscal Year 2020 is \$177,500. Illinois law (40 ILCS 5/15-155(j-5)) requires employers to pay the employer normal cost on the portion of an employee’s earnings in excess of the Governor’s salary.

HB 5755 takes effect on July 1, 2020.

Status: Filed with the House Clerk on 3/11/2020.

Senate Bills

Senate Bill 2545 – SURS Trustee Status Clarification

Sponsors – Senator Cristina Castro

SB 2545 amends the State Universities Retirement System’s article of the Illinois Pension Code to clarify the intent of the General Assembly regarding a SURS trustee’s change in status.

Specifically, the SURS Board of Trustees consists of six elected trustees (four from participating employees and two from annuitants) and five appointed trustees. SURS' statute does not clearly indicate what happens when a trustee experiences a change in status (for example, a participating employee retires or an annuitant returns to work as a participating employee). As a result, SURS requested an opinion from the Attorney General's Office on the subject. In response to SURS' request, the Attorney General's Office indicated that the statute is "ambiguous" and recommended that "SURS pursue legislation to clarify the General Assembly's intent." SB 2545 seeks to establish the intent of the General Assembly regarding a SURS trustee's change in status. It also makes a technical change in terms from "active participant" to "participating employee," consistent with statute.

SB 2545 takes effect immediately upon becoming law.

SB 2545 is identical to HB 4323 of the 101st General Assembly.

Status: Senate Placed on Calendar Order of 3rd Reading on 2/25/2020.

Senate Bill 2554 - Pension Stabilization Fund - Transfers

Sponsors - Senator Heather A. Steans

SB 2554 amends the Budget Stabilization Act to require \$200 million to be transferred into the Pension Stabilization Fund when the State's bill backlog is less than \$3 billion. Money in the Pension Stabilization Fund must be used to make payments to reduce the unfunded liabilities of the state-funded retirement systems.

Currently, when State expenditures are less than 99% of revenues, 0.5% of the estimated general funds revenues must be transferred into the Pension Stabilization Fund. Additionally, when State expenditures are less than 98% of revenues, 1% of the estimated general funds revenues must be transferred into the Pension Stabilization Fund. Under SB 2554, if the State's bill backlog on June 30th is less than \$3 billion, then \$200 million must be transferred from the General Revenue Fund to the Pension Stabilization Fund in equal monthly installments.

SB 2554 also amends the State Budget Law of the Civil Administrative Code of Illinois to add the Pension Stabilization Fund to the list of general funds under the Act.

SB 2554 makes other changes.

SB 2554 takes effect immediately upon becoming law.

Status: Senate Placed on Calendar Order of 3rd Reading on 3/4/2020.

Senate Bill 2747 – Payment of Pension Benefits – Recovery of Legal Costs**Sponsors – Senator Laura Fine**

SB 2747 gives the court discretion to allow parties to a legal action concerning the payment of pension benefits to recover reasonable legal costs associated with the action.

Specifically, SB 2747 amends the General Provisions article of the Illinois Pension Code to provide that, in any action by a participant or beneficiary arising under the Illinois Pension Code or Article 13, Section 5 of the Illinois Constitution in which there is at issue the payment of benefits due to a participant or beneficiary, the court, in its discretion, may allow either party to recover reasonable attorney's fees and the costs of the action.

SB 2747 takes effect immediately upon becoming law.

Status: Senate Referred to Assignments Committee on 2/4/2020.

Senate Bill 2795 – Required Minimum Distribution Age Technical Correction**Sponsors – Senator Robert F. Martwick**

SB 2795 amends the State Universities Retirement System article of the Illinois Pension Code to correct an outdated reference to the required minimum distribution age under the Internal Revenue Code.

On December 20, 2019, the federal Setting Every Community Up for Retirement Enhancement (SECURE) Act became law. Among other changes, it increased the required minimum distribution age from 70.5 to 72. SB 2795 makes the reference to the required minimum distribution age in SURS' statute consistent with federal law.

SB 2795 makes similar changes under the General Assembly Retirement System, Illinois Municipal Retirement Fund, State Employees Retirement System, Teachers Retirement System, and Judges Retirement System articles of the Illinois Pension Code.

SB 2795 takes effect immediately upon becoming law.

Status: Arrived in the House on 3/4/2020; Passed the Senate (56-0-0) on 3/4/2020.

Senate Bill 3004 – SEGIP Re-Enrollment after Non-Payment of Premiums**Sponsors – Senator Christopher Belt**

SB 3004 amends the State Employees Group Insurance Act of 1971 to permit an annuitant, survivor, or retired employee whose coverage has been terminated for non-payment of premiums to re-enroll in the program of group health benefits during the next annual benefit choice period, as determined by the Director of Central Management Services, if he or she has fully paid all previous non-payments prior to that re-enrollment. SB 3004 permits re-enrollment in such circumstances prior to January 1, 2022.

Currently, in the event of termination of coverage due to non-payment of premiums, the annuitant, survivor, or retired employee cannot re-enroll in the program of group health benefits.

SB 3004 takes effect immediately upon becoming law.

SB 3004 is similar to House Amendment #1 to HB 139 of the 101st General Assembly.

Status: Senate Postponed in State Government Committee on 2/19/2020.

Senate Bill 3006 – Merge ICCB and ISAC into IBHE

Sponsors – Senator Chapin Rose

SB 3006 amends multiple statutes to merge the Illinois Community College Board and the Illinois Student Assistance Commission into the Illinois Board of Higher Education on January 1, 2021. SB 3006 establishes that the rights of State employees, the State, and its agencies under the Personnel Code and applicable collective bargaining agreements and retirement plans are not affected by this change.

SB 3006 takes effect in accordance with the Effective Date of Laws Act.

SB 3006 is nearly identical to SB 1376 of the 101st General Assembly.

Status: Senate Postponed in Higher Education Committee on 2/18/2020.

Senate Bill 3019 – SURS Supplemental Defined Contribution Plan – EACA

Sponsors – Senator Robert F. Martwick

SA #1 to SB 3019 requires the supplemental defined contribution plan to provide for one or more automatic contribution arrangements, at least one of which shall be an eligible automatic contribution arrangement that permits a withdrawal of default elective contributions in accordance with Section 414(w) of the Internal Revenue Code of 1986, as amended, and United States Department of Treasury regulations.

As introduced, SB 3019 amends the State Universities Retirement System article of the Illinois Pension Code to require the supplemental defined contribution plan to provide for an eligible automatic contribution arrangement that permits a withdrawal of default elective contributions in accordance with Section 414(w) of the Internal Revenue Code of 1986, as amended, and United States Department of Treasury regulations. SB 3019 also makes a technical change from the term “defined contribution benefit” to “defined contribution plan.”

SB 3019 takes effect immediately upon becoming law.

Status: Senate Placed on Calendar Order of 3rd Reading on 2/20/2020.

**Senate Bill 3061 – Repeal CMS Report
Sponsors – Senator Michael E. Hastings**

SB 3061 amends the State Universities Retirement System article of the Illinois Pension Code to repeal a requirement that the Department of Central Management Services prepare an annual report showing, on a fiscal year by fiscal year basis, the amount by which the State’s cost for health insurance coverage for retirees of the State’s universities and their survivors has declined as a result of requiring some of those retirees and survivors to contribute to the cost of their basic health insurance.

SB 3061 takes effect immediately upon becoming law.

Status: Senate Placed on Calendar Order of 2nd Reading on 3/4/2020.

**Senate Bill 3318 – Governmental Ethics Reforms
Sponsors – Senator Julie Morrison**

SB 3318 amends the Illinois Governmental Ethics Act to create a uniform statement of economic interests beginning with statements filed in 2021. Information included in the uniform economic statement will include:

- (1) Each asset with a value in excess of \$5,000;
- (2) Each source of income in excess of \$1,200 and the transaction dates for assets that generated more than \$5,000 in capital gains when sold or transferred;
- (3) Each creditor of a debt in excess of \$5,000;
- (4) Each debtor of a debt in excess of \$5,000;
- (5) The name of each unit of local government of which the filer was an employee, contractor, or office holder;

- (6) Each person known to the filer to be a registered lobbyist with any unit of government and with whom the filer has an economic or familial relationship; and
- (7) Each source and type of gift or honorarium valued in excess of \$500.

SB 3318 requires the Secretary of State to adjust the amounts in the statement of economic interests every five years, beginning on December 1, 2025, in order to account for inflation.

SB 3318 takes effect in accordance with the Effective Date of Laws Act.

SB 3318 is nearly identical to HB 4618 and similar to HA #2 to SB 1639 and HB 3988 of the 101st General Assembly.

Status: Senate Referred to Assignments Committee on 2/14/2020.

Senate Bill 3391 – Pension Code – Noncompliance

Sponsors – Senator Laura Ellman

SB 3391 amends the Regulation of Public Pension Funds article of the Illinois Pension Code to impose and increase penalties for noncompliance with the Illinois Pension Code and to allow the Attorney General or State's Attorney to order a pension fund's compliance with the Illinois Pension Code.

Specifically, SB 3391 requires a pension fund to comply within 15 days after the receipt of a notice of noncompliance with the following provisions:

- The requirement to file an annual statement with the Public Pension Division of the Department of Insurance within 6 months after the close of the fiscal year;
- The requirement to file an actuarial statement with the Public Pension Division of the Department of Insurance within 9 months after the close of the fiscal year; and
- The requirement to pay an annual compliance fee to the Department of Insurance by June 30th.

SB 3391 requires a pension fund that fails, without just cause, to submit requested examination documentation within the time prescribed in a written notice to pay to the Department of Insurance a penalty of up to \$100 for each day's delay and to comply within 15 days after receipt of the notice of noncompliance.

SB 3391 authorizes the Director of the Department of Insurance to assess a civil penalty of up to \$4,000 (currently, \$2,000) for each noncompliance with an order of the Director, if

evidence of compliance has not been submitted to the Director within the period of time prescribed in the order and no administrative appeal has been initiated by the pension fund. The pension fund must immediately comply with the Director's order, post all orders received on its website, and note the order in the quarterly board minutes.

SB 3391 establishes that if there is no compliance within 30 days after the date of the order, the Director must report the act of noncompliance to the Attorney General.

Finally, SB 3391 establishes that the Attorney General or State's Attorney may order a pension fund's compliance with the Illinois Pension Code.

SB 3391 makes other changes and takes effect immediately upon becoming law.

Status: Senate Referred to Assignments Committee on 2/14/2020.

**Senate Bill 3562 – Open Meetings Act – Review Minutes of Closed Meetings
Sponsors – Senator John F. Curran**

SB 3562 amends the Open Meetings Act to require each public body to periodically meet to review minutes of all closed meetings every 6 months, or as soon thereafter as is practicable, taking into account the nature and meeting schedule of the public body. Committees that are ad hoc in nature must review closed session minutes at the later of: (1) 6 months from the date of the last review of closed session minutes or (2) at the next scheduled meeting of the ad hoc committee. Under current law, each public body must meet periodically, but no less than semi-annually, to review minutes of all closed meetings.

SB 3562 establishes that when a public body is dissolved, disbanded, eliminated, or consolidated by executive action, legislative action, or referendum, the governing body of the unit of local government in which the public body was located must review the closed session minutes of that public body.

SB 3562 takes effect in accordance with the Effective Date of Laws Act.

Status: Senate Assigned to Local Government Committee on 3/3/2020.

**Senate Bill 3600 – SURS Affected Annuitant Exemption
Sponsors – Senator Scott M. Bennett**

SB 3600 amends the State Universities Retirement System article of the Illinois Pension Code to exempt an employer that employs an affected annuitant to fill a posted position that has

been vacant for at least 180 days from the requirement to pay the employer contribution for that annuitant for one academic year. The employer must immediately notify SURS upon employing an affected annuitant under these circumstances.

SB 3600 takes effect in accordance with the Effective Date of Laws Act.

Status: Senate Assigned to Government Accountability and Pensions Committee on 3/12/2020.

Senate Bill 3680 – Transition from Public to Nonpublic Universities

Sponsors – Senator William E. Brady

SB 3680 amends multiple statutes to require each public university in Illinois to transition into a nonpublic institution of higher education, beginning on July 1, 2020. Each board of trustees of a public university must develop and implement a 6-year plan for the transition that includes all of the following: (1) a date upon which the university will be deemed to be a nonpublic institution of higher education; (2) the appointment of a governing board to oversee the nonpublic university; (3) a determination of all books, records, funds, and other property that will be transferred; (4) how employees, along with their health care, retirement, and all other benefits, as well as any collective bargaining agreements, will be addressed; and (5) recommendations concerning the statutory changes needed to effectuate and reflect the transition. A copy of the transition plan must be filed with the General Assembly.

SB 3680 takes effect immediately upon becoming law.

Status: Senate Referred to Assignments Committee on 2/14/2020.

Senate Bill 3747 – MWDBE Utilization and Sustainable Investing Continuing Education

Sponsors – Senator Iris Y. Martinez

SB 3747 amends the General Provisions article of the Illinois Pension Code to require trustees to complete a minimum of two hours of continuing education regarding the requirements and obligations of Sections 1-109.1, 1-113.6, and 1-113.7 of the Illinois Pension Code. These Sections contain requirements related to MWDBE utilization and sustainable investing. Existing trustees must complete the continuing education within 6 months after the effective date of the legislation and at least once every three years thereafter. New trustees must complete the continuing education training within six months after first becoming a trustee and at least once every three years thereafter. SB 3747 applies to the Chicago and Cook County pension funds, Illinois Municipal Retirement Fund, State Universities Retirement System, Teachers' Retirement System, Illinois State Board of

Investment, Police Officers' Pension Investment Fund, and Firefighters' Pension Investment Fund.

SB 3747 takes effect immediately upon becoming law.

Status: Senate Assigned to Government Accountability and Pensions Committee on 3/12/2020.

Senate Bill 3748 – Emerging Investment Manager RFP Exemption

Sponsors – Senator Iris Y. Martinez

SB 3748 amends the General Provisions article of the Illinois Pension Code to provide that contracts for investment services with an emerging investment manager are exempt from competitive bidding requirements. Under current law, exemptions from competitive bidding requirements exist for: (1) sole source procurements; (2) emergency procurements; (3) contracts that are renewable, one year or less in duration, and less than \$20,000 (at the discretion of the pension fund, retirement system, and investment board); and (4) contracts for follow-on funds with the same fund sponsor through closed-end funds (at the discretion of the pension fund, retirement system, or investment board).

SB 3748 takes effect on January 1, 2021.

SB 3748 is similar to SB 1671 of the 101st General Assembly.

Status: Senate Assigned to Government Accountability and Pensions Committee on 3/12/2020.

Senate Bill 3749 – Emerging Investment Manager Goals – Total Fees Paid

Sponsors – Senator Iris Y. Martinez

SB 3749 requires goals for the utilization of emerging investment managers to be based on the percentage of total fees paid for (instead of the dollar amount of) assets under management.

Specifically, SB 3749 amends the General Provisions article of the Illinois Pension Code to establish that, by January 1, 2021 (currently, January 1, 2010), a retirement system, pension fund, or investment board under the Illinois Pension Code must adopt a policy that sets forth goals for utilization of emerging investment managers. This policy must include quantifiable goals for the management of assets in specific asset classes by emerging investment managers. The retirement system, pension fund, or investment board must establish three separate goals for: (1) emerging investment managers that are minority-owned businesses;

(2) emerging investment managers that are women-owned businesses; and (3) emerging investment managers that are businesses owned by a person with a disability. The goals must 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. Each retirement system, pension fund, and investment board must report to the Governor and the General Assembly by January 1 of each year on the total dollar amount of fees paid under investment contracts with emerging investment managers for the three separate goals (currently, the percentage of assets under the investment control of emerging investment managers for the three separate goals). Finally, SB 3749 establishes that it is the aspirational goal for a retirement system, pension fund, or investment board to use emerging investment managers for not less than 20% of the total fees paid in each asset class (currently, 20% of the total funds under management).

SB 3749 takes effect immediately upon becoming law.

SB 3749 is similar to SB 2060 of the 101st General Assembly.

Status: Senate Referred to Assignments Committee on 2/14/2020.

Senate Bill 3750 – Emerging Investment Manager – Definition

Sponsors – Senator Iris Y. Martinez

SB 3750 amends the General Provisions article of the Illinois Pension Code to provide that an emerging investment manager who manages an investment portfolio of less than \$10 million or more than \$20 billion will remain an emerging investment manager if at the time of the initial contract if the retirement system, pension fund, or investment board, the emerging investment manager managed an investment portfolio of at least \$10 million but less than \$20 billion. Under current law, an emerging investment manager must have at least \$10 million but less than \$10 billion in assets under management to be considered an emerging investment manager. (An emerging investment manager must also be a minority-owned business, women-owned business, or business owned by a person with a disability, as those terms are defined in the Business Enterprise for Minorities, Women, and Persons with Disabilities Act.)

SB 3750 takes effect on January 1, 2021.

SB 3750 is similar to SB 1671 of the 101st General Assembly.

Status: Senate Referred to Assignments Committee on 2/14/2020.

Senate Bill 3766 – Non-Tenured and Adjunct Faculty – State Benefits

Sponsors – Senator Laura Fine

SB 3766 amends multiple statutes to require the board of trustees of each public university and community college district to provide State benefits, including health insurance and pension benefits, for adjunct faculty teaching a combined 50% workload at any combination of public higher education institutions.

SB 3766 takes effect immediately upon becoming law.

SB 3766 is identical to HB 5445 of the 101st General Assembly.

Status: Senate Assigned to Appropriations II Committee on 3/12/2020.

Senate Bill 3810 – SURS 12 Days for Month of Service Credit

Sponsors – Senator Robert F. Martwick

SB 3810 amends the State Universities Retirement System article of the Illinois Pension Code to require a participating employee to work for at least 12 days in a month (currently, 15 days in a month) in order to receive one month of service credit.

SB 3810 takes effect in accordance with the Effective Date of Laws Act.

Status: Senate Referred to Assignments Committee on 2/14/2020.

Senate Bill 3893 – BEP – Socially Disadvantaged Individuals

Sponsors – Senator Ram Villivalam

SB 3893 amends the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to modify the definition of a “minority person” to include a person who qualifies as a socially disadvantaged individual. SB 3893 defines a socially disadvantaged person as a person individually certified by the Business Enterprise Council as having been subjected to racial or ethnic prejudice or cultural bias within American society because of his or her identity as a member of a group and without regard to his or her individual qualities. Social disadvantage includes the following: (1) at least one objective distinguishing feature that has contributed to social disadvantage, such as race, ethnic origin, gender, disability, long-term residence in an environment isolated from the mainstream of American society, or other similar causes not common to individuals who are not socially disadvantaged; (2) personal experiences of substantial and chronic social disadvantage in American society; and (3) negative impact on entry into or advancement in the business world because of the disadvantage. The Council must consider education, employment, and

business history, where applicable, to determine whether the totality of circumstances shows disadvantage in entering into or advancing in the business world.

SB 3893 takes effect in accordance with the Effective Date of Laws Act.

Status: Senate Assigned to Executive Committee on 3/12/2020.

Senate Bill 3922 – FY 2020 Supplemental Budget

Sponsors – Senator Don Harmon

SB 3922 appropriates \$50,000 from the General Revenue Fund to SURS for employer contributions required by the State as an employer in FY 2020. These contributions are required due to the collectively bargained back wages paid to participating employees at the Department of Innovation and Technology pursuant to Public Act 101-7.

SB 3922 takes effect immediately upon becoming law.

As it relates to SURS, SB 3922 is identical to HB 5746 of the 101st General Assembly.

Status: Senate Referred to Assignments Committee on 2/21/2020.

Senate Bill 3950 – Governor’s FY 2021 Introduced Budget

Sponsors – Senator Don Harmon

SB 3950 appropriates \$1,995,767,000 to SURS for the annual required State contribution for FY 2021. Of this amount, \$1,780,767,000 comes from the General Revenue Fund, and \$215,000,000 comes from the State Pensions Fund. This amount is equal to the amount of the annual required State contribution certified by SURS for FY 2021.

SB 3950 appropriates \$7,282,374 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the State’s contribution to the College Insurance Program (“CIP”), which provides health insurance benefits for community college retirees. This amount is \$2,619,601 greater than the certified contribution to CIP (\$4,662,773) for FY 2021.

SB 3950 appropriates \$37,560,255 from the General Revenue Fund to SURS for deposit into the Community College Health Insurance Security Fund for additional State contributions to CIP for FY 2021.

SB 3950 takes effect on July 1, 2020.

SB 3950 is identical to HB 5687 of the 101st General Assembly.

Status: Senate Referred to Assignments Committee on 2/21/2020.

Constitutional Amendments Filed

House Joint Resolution Constitutional Amendment 38 – Protect Accrued and Payable Pension and Retirement Benefits

Sponsors – Representative Deanne M. Mazzochi

HJRCA 38 resolves by the Illinois House of Representatives, with the concurrence of the Illinois Senate, that there must be submitted to the electors of the state for adoption or rejection at the general election next occurring at least six months after adoption of the resolution a proposition to amend Article XIII, Section 5 of the Illinois Constitution to only protect accrued and payable pension and retirement benefits.

Specifically, HJRCA 38 amends Article XIII, Section 5 of the Illinois Constitution to provide that membership in any pension or retirement system of the state, any unit of local government or school district, or any agency or instrumentality thereof, must be an enforceable contractual relationship, the accrued and payable benefits of which must not be diminished or impaired. HJRCA 38 further establishes that nothing in 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.

Article XIII, Section 5 of the Illinois Constitution currently provides that membership in any pension or retirement system of the state, any unit of local government or school district, or any agency or instrumentality thereof, must be an enforceable contractual relationship, the benefits of which must not be diminished or impaired. HJRCA 38 would limit this protection to benefits that are already accrued and payable under the public pension systems and public retirement systems.

HJRCA 38 takes effect upon being declared adopted in accordance with Section 7 of the Illinois Constitutional Amendment Act.

HJRCA 38 is nearly identical to HJRCA 21 and SJRCA 9 of the 101st General Assembly.

Status: House Referred to Rules Committee on 1/29/2020.

House Joint Resolution Constitutional Amendment 45 – Pension Benefit Changes

Sponsors – Representative Joe Sosnowski

HJRCA 45 resolves by the Illinois House of Representatives, with the concurrence of the Illinois Senate, that there must be submitted to the electors of the state for adoption or rejection at the general election next occurring at least six months after adoption of the resolution a proposition to amend Article XIII, Section 5 of the Illinois Constitution to change pension benefits.

Specifically, HJRCA 45 amends Article XIII, Section 5 of the Illinois Constitution to establish that a person who has not attained 65 years of age is not entitled to receive a retirement pension. Additionally, automatic annual increases to any pension cannot exceed the lesser of 2% of the pension amount or the annual unadjusted percentage increase (but not less than zero) in the consumer price index, compounded. Finally, no pension can exceed \$110,000 annually, except that the \$110,000 is annually increased by the lesser of 2% or the annual unadjusted percentage increase (but not less than zero) in the consumer price index, compounded.

Article XIII, Section 5 of the Illinois Constitution currently provides that membership in any pension or retirement system of the state, any unit of local government or school district, or any agency or instrumentality thereof, must be an enforceable contractual relationship, the benefits of which must not be diminished or impaired. HJRCA 45 would repeal this provision and change pension benefits.

HJRCA 45 takes effect upon being declared adopted in accordance with Section 7 of the Illinois Constitutional Amendment Act.

Status: House Referred to Rules Committee on 2/20/2020.

House Joint Resolution Constitutional Amendment 46 – Repeal Constitutional Pension and Retirement Rights

Sponsors – Representative Joe Sosnowski

HJRCA 46 resolves by the Illinois House of Representatives, with the concurrence of the Illinois Senate, that there must be submitted to the electors of the state for adoption or rejection at the general election next occurring at least six months after adoption of the resolution a proposition to repeal Article XIII, Section 5 of the Illinois Constitution.

Specifically, HJRCA 46 repeals the “Pension and Retirement Rights” section of the Illinois Constitution (Article XIII, Section 5). This section provides that membership in any pension or retirement system of the state, any unit of local government or school district, or any

agency or instrumentality thereof, must be an enforceable contractual relationship, the benefits of which must not be diminished or impaired.

HJRCA 46 takes effect upon being declared adopted in accordance with Section 7 of the Illinois Constitutional Amendment Act.

HJRCA 46 is identical to HJRCA 19 and HJRCA 20 of the 101st General Assembly.

Status: House Referred to Rules Committee on 2/26/2020.

Resolutions Filed

House Resolution 727 – Oppose Financial Transaction Tax **Sponsors – Representative Joe Sosnowski**

HR 727 resolves, by the Illinois House of Representatives, that they support the continued health and operation of the financial transaction markets of Illinois and oppose the concept of a privilege tax on financial transactions.

HR 727 further resolves that any tax of this type will be passed on to burden the savings activities of people all over the world, including Illinois workers saving for retirement.

Finally, HR 727 resolves that suitable copies of this resolution be delivered to the Speaker of the House of Representatives, the Minority Leader of the House of Representatives, the President of the Senate, the Minority Leader of the Senate, the Mayor of the City of Chicago, and the chief executive officer of the CME Group.

Status: House Assigned to Sales, Amusement, and Other Taxes Subcommittee of Revenue and Finance Committee on 2/25/2020.

Senate Resolution 973 – Audit of Boards and Commissions **Sponsors – Senator Dan McConchie**

SR 973 resolves, by the Illinois Senate, that the Illinois Auditor General is directed to conduct a management audit of the State's boards and commissions. SR 973 further resolves that the audit will include, but not be limited to, the following for every known State board and commission: (1) its name and purpose; (2) the number of appointed members and the number of vacancies and the length of the vacancies; (3) costs of member stipends, salaries,

and per diems and expense reimbursements to members and State officials and employees for attending board and commission meetings during Fiscal Years 2019 and 2020; (4) the date of each board's or commission's meetings during Fiscal Years 2019 and 2020 and the number of members in attendance and the number of members absent; and (5) identification of any report or work product prepared and made available by the board or commission during Fiscal Years 2019 and 2020. Finally, SR 973 resolves that the Illinois Auditor General commence this audit as soon as possible and report his or her findings and recommendations upon completion.

Status: Senate Referred to Assignments Committee on 2/4/2020.

101st 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.	Similar to SB 3004 (Sen. Belt)	HA #1 Referred to Rules Committee on 4/9/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=0139&GAID=15&DocTypeID=HB&LegID=113961&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=199&GAID=15&DocTypeID=HB&LegID=114063&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=280&GAID=15&DocTypeID=HB&LegID=114403&SessionID=108&GA=101
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	http://ilga.gov/legislation/billsatus.asp?DocNum=329&GAID=15&GA=101&DocTypeID=HB&LegID=114489&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=350&GAID=15&DocTypeID=HB&LegID=114533&SessionID=108&GA=101
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 Re-Referred to Rules Committee on 7/2/19; Passed the Senate (51-6-0) on 6/1/19	http://ilga.gov/legislation/billsatus.asp?DocNum=816&GAID=15&GA=101&DocTypeID=HB&LegID=115070&SessionID=108
SA #1 to HB 816	Sen. Steans	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	http://ilga.gov/legislation/billsatus.asp?DocNum=816&GAID=15&GA=101&DocTypeID=HB&LegID=115070&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=902&GAID=15&DocTypeID=HB&LegID=115234&SessionID=108&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&GA=15&DocTypeID=HB&LegID=115632&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&GA=15&DocTypeID=HB&LegID=115632&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&GA=15&DocTypeID=HB&LegID=115632&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1260&GA=15&DocTypeID=HB&LegID=115632&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1576&GA=15&DocTypeID=HB&LegID=116040&SessionID=108&GA=101
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 Assigned to Personnel and Pensions Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=1605&GA=15&DocTypeID=HB&LegID=116105&SessionID=108&GA=101

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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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1625&GAID=15&DocTypeID=HB&LegID=116166&SessionID=108&SpecSess=&Session=&GA=101
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.		Governor Pritzker Signed into Law as Public Act 101-0242 on 8/9/19 (House: 116-0-0; Senate: 56-0-0)	http://ilga.gov/legislation/billsatus.asp?DocNum=2029&GAID=15&GA=101&DocTypeID=HB&LegID=117529&SessionID=108
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.	Identical to HB 4117 (Rep. Meier)	House Re-Referred to Rules Committee on 3/29/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=2054&GAID=15&DocTypeID=HB&LegID=117568&SessionID=108&GA=101
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	http://ilga.gov/legislation/billsatus.asp?DocNum=2101&GAID=15&GA=101&DocTypeID=HB&LegID=117733&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2279&GAID=15&DocTypeID=HB&LegID=118129&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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.	Nearly Identical to HB 4114 (Rep. Meier)	House Re-Referred to Rules Committee on 3/29/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=2394&GAID=15&DocTypeID=HB&LegID=118359&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2440&GAID=15&DocTypeID=HB&LegID=118448&SessionID=108&GA=101
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	http://ilga.gov/legislation/fulltext.asp?DocName=&SessionID=108&GA=101&DocTypeID=HB&DocNum=2441&GAID=15&LegID=118449&SpecSess=&Session=
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2452&GAID=15&DocTypeID=HB&LegID=118460&SessionID=108&GA=101
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)	Governor Pritzker signed into law as Public Act 101-0473 on 8/23/19 (House: 73-42-0; Senate: 37-19-0)	http://ilga.gov/legislation/BillStatus.asp?DocNum=2460&GAID=15&DocTypeID=HB&LegID=118468&SessionID=108&GA=101

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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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2547&GAID=15&DocTypeID=HB&LegID=118654&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/billsatus.asp?DocNum=2567&GAID=15&GA=101&DocTypeID=HB&LegID=118696&SessionID=108
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.	Identical to HB 4076 (Rep. Cabello)	House Re-Referred to Rules Committee on 3/29/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=2592&GAID=15&DocTypeID=HB&LegID=118725&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2664&GAID=15&DocTypeID=HB&LegID=118852&SessionID=108&SpecSess=&Session=&GA=101
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.	Nearly Identical to HB 4712 (Rep. Sosnowski)	House Re-Referred to Rules Committee on 3/29/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=2740&GAID=15&DocTypeID=HB&LegID=118985&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2749&GAID=15&DocTypeID=HB&LegID=118994&SessionID=108&GA=101

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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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2902&AID=15&DocTypeID=HB&LegID=119211&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2910&AID=15&DocTypeID=HB&LegID=119219&SessionID=108&GA=101
HB 3082 (ENRL)	Rep. Martwick (Sen. Aquino)	SRS Automatic Enrollment into State 457 Plan	Creates a default investment option under the State Employees Deferred Compensation Plan. Automatically enrolls new members of the General Assembly Retirement System, State Employees' Retirement System, and Judges' Retirement System into the State Employees Deferred Compensation Plan.		Governor Pritzker signed into law on 8/9/19 as Public Act 101-0277 (House: 111-0-0; Senate: 59-0-0)	http://ilga.gov/legislation/billstatus.asp?DocNum=3082&GAID=15&GA=101&DocTypeID=HB&LegID=119445&SessionID=108
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.	Nearly Identical to HB 5412 (Rep. Wehrli)	House Re-Referred to Rules Committee on 3/29/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3131&AID=15&DocTypeID=HB&LegID=119541&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=3256&AID=15&DocTypeID=HB&LegID=119705&SessionID=108&SpecSess=&Session=&GA=101
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	http://www.ilga.gov/legislation/billstatus.asp?DocNum=3308&GAID=15&GA=101&DocTypeID=HB&LegID=119783&SessionID=108
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	http://www.ilga.gov/legislation/billstatus.asp?DocNum=3308&GAID=15&GA=101&DocTypeID=HB&LegID=119783&SessionID=108
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	http://www.ilga.gov/legislation/billstatus.asp?DocNum=3308&GAID=15&GA=101&DocTypeID=HB&LegID=119783&SessionID=108

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HA #4 to HB 3308	Rep. E. 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	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3308&GAID=15&DocTypeID=HB&LegID=119783&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=3376&GAID=15&DocTypeID=HB&LegID=119954&SessionID=108&GA=101
HB 3428	Rep. E. 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	http://ilga.gov/legislation/BillStatus.asp?DocNum=3428&GAID=15&DocTypeID=HB&LegID=120024&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=3518&GAID=15&DocTypeID=HB&LegID=120161&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=3524&GAID=15&DocTypeID=HB&LegID=120185&SessionID=108&GA=101
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 Re-Referred to Rules Committee on 7/2/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3718&GAID=15&DocTypeID=HB&LegID=120573&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 3854	Rep. Skillicorn	Maximum Dollar Limit for Retirement Benefits	Limits the total amount of retirement annuity or pension benefits that any person who first becomes a participant in any retirement system or pension fund on or after the effective date of the legislation can receive to \$132,900 in any year. Annually increases the \$132,900 limit by the percentage increase (but not less than zero) in the consumer price index-u, compounded.	Similar to HB 3859 (Rep. Skillicorn)	House Referred to Rules Committee on 10/17/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3854&GAID=15&DocTypeID=HB&LegId=121775&SessionID=108&GA=101
HB 3855	Rep. West	General Assembly COLA Opt-Out	Allows members of the General Assembly to elect not to receive cost of living adjustments and to have funds associated with cost of living adjustments paid into the State Pensions Fund. (Through Fiscal Year 2020, the State Pensions Fund is mostly used to make the State's required contribution to the State Universities Retirement System. Beginning in Fiscal Year 2021, the State Pensions Fund is mostly used to reduce the unfunded liabilities of the five state-funded retirement systems.)		House Re-Referred to Rules Committee on 12/16/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3855&GAID=15&DocTypeID=HB&LegId=121791&SessionID=108&GA=101
HB 3859	Rep. Skillicorn	Maximum Dollar Limit for Retirement Benefits	Limits the total amount of retirement annuity or pension benefits that any person can receive from any pension fund or retirement system to \$132,900 in any year. Annually increases the \$132,900 limit by the percentage increase (but not less than zero) in the consumer price index-u, compounded. Applies without regard to whether a person became a member, participant, beneficiary, or annuitant before the effective date of the legislation.	Similar to HB 3854 (Rep. Skillicorn)	House Referred to Rules Committee on 10/17/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3859&GAID=15&DocTypeID=HB&LegId=121829&SessionID=108&SpecSess=&Session=&GA=101
HB 3860	Rep. Skillicorn	Change Automatic Annual Increases to CPI-U	Requires the retirement annuity or supplemental annuity of a participant, member, or annuitant in any pension fund or retirement system to be subject to annual increases equal to the annual unadjusted percentage increase in the consumer price index-u (but not less than zero). Applies without regard to whether a participant or a member is in active service on or after the effective date of the legislation.		House Referred to Rules Committee on 10/17/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3860&GAID=15&DocTypeID=HB&LegId=121830&SessionID=108&SpecSess=&Session=&GA=101
HB 3868	Rep. Skillicorn	Minimum Retirement Age Increase by 2 Years	Increases the minimum age at which a person is eligible to receive a retirement annuity or pension by two years, using the following schedule: one year beginning on the effective date of the legislation and one additional year beginning five years after the effective date of the legislation.		House Referred to Rules Committee on 10/17/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=3868&GAID=15&DocTypeID=HB&LegId=121880&SessionID=108&SpecSess=&Session=&GA=101
HB 3919	Rep. Skillicorn	Mandatory Tier III Plan for All Members	Creates a mandatory Tier III plan (defined contribution plan) for existing members of the five state-funded retirement systems. Prohibits State funding for plans other than the Tier III plan.		House Referred to Rules Committee on 10/17/19	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=3919&GAID=15&DocTypeID=HB&LegId=122104&SessionID=108&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 3988	Rep. Skillicorn	Governmental Ethics Reforms	Creates a uniform statement of economic interests beginning with statements filed in 2020. Requires the following information to be disclosed in the uniform statement of economic interests: (1) Each asset with a value in excess of \$5,000; (2) Each source of income in excess of \$1,200 and the transaction dates for assets that generated more than \$5,000 in capital gains when sold or transferred; (3) Each creditor of a debt in excess of \$5,000; (4) Each debtor of a debt in excess of \$5,000; (5) The name of each unit of local government of which the filer was an employee, contractor, or office holder; (6) Each person known to the filer to be a registered lobbyist with any unit of government and with whom the filer has an economic or familial relationship; and (7) Each source and type of gift or honorarium valued in excess of \$500. Requires the Secretary of State to create a publicly accessible and searchable database with disclosures made by registered lobbyists under the Lobbyist Registration Act, contributions made by registered lobbyists that are required to be disclosed under the Election Code, and statements of economic interests required to be filed by State officials and employees under the Illinois Governmental Ethics Act.	Nearly Identical to HA #2 to SB 1639 (Rep. Harris) and similar to HB 4618 (Rep. Stava-Murray) and SB 3318 (Sen. Morrison)	House Referred to Rules Committee on 1/8/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=3988&GAID=15&GA=101&DocTypeID=HB&LegID=122620&SessionID=108
HB 3990	Rep. Skillicorn	Actuary Bonds	Requires each actuary that prepares an actuarial statement for a pension fund or retirement system to post a bond of \$2 billion.		House Referred to Rules Committee on 1/8/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3990&GAID=15&DocTypeID=HB&LegID=122624&SessionID=108&SpecSess=&Session=&GA=101
HB 4036	Rep. Scherer	SEGIP Define Qualifying Change in Status	Defines the phrase "qualifying change in status" under the State Employees Group Insurance Act of 1971 with language from IRS rules and regulations.		House Assigned to Personnel and Pensions Committee on 2/18/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=4036&GAID=15&GA=101&DocTypeID=HB&LegID=122743&SessionID=108
HA #1 to HB 4036	Rep. Scherer	SEGIP Define Qualifying Change in Status	Re-inserts the provisions of the original legislation with technical changes. Requires any request to elect dependent coverage due to a qualifying change in status to be consistent with the change in status experienced by the member.		HA #1 Referred to Rules Committee on 3/5/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4036&GAID=15&DocTypeID=HB&LegID=122743&SessionID=108&SpecSess=&Session=&GA=101
HB 4076	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.	Identical to HB 2592 (Rep. Cabello)	House Referred to Rules Committee on 1/16/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4076&GAID=15&DocTypeID=HB&LegID=122989&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 4090	Rep. Skillicorn	Unbalanced Budget Response Act	Authorizes the Governor to designate a contingency reserve from amounts appropriated from funds held by the Treasurer for Fiscal Years 2021 and 2022 to any agency, including amounts appropriated pursuant to a statutory continuing appropriation. Authorizes the Governor to delay payments under statutory continuing appropriations for Fiscal Years 2021 and 2022 and allows delayed payments to be paid out of the next fiscal year's appropriation. Authorizes the Governor to transfer amounts from funds held by the Treasurer to general funds held by the Treasurer.		House Referred to Rules Committee on 1/16/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4090&GAID=15&DocTypeID=HB&LegID=123026&SessionID=108&GA=101
HB 4091	Rep. Skillicorn	SURS Employer Normal Cost Shift	Requires the actual employer of a participating employee in SURS to contribute the employer normal cost for that employee. Requires SURS to recalculate and recertify the required State contribution for the current fiscal year, taking into account the actual-employer normal-cost contributions required by the legislation.		House Referred to Rules Committee on 1/16/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4091&GAID=15&DocTypeID=HB&LegID=123027&SessionID=108&GA=101
HB 4114	Rep. Meier	New Revenues Fund State Pension Obligations	Requires any new and additional revenue sources that exceed the fiscal year 2020 revenue forecasts reported by the Commission on Government Forecasting and Accountability in 2019 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.	Nearly Identical to HB 2394 (Rep. Meier)	House Referred to Rules Committee on 1/16/20	http://ilga.gov/legislation/fulltext.asp?DocName=&SessionID=108&GA=101&DocTypeID=HB&DocNum=4114&GAID=15&LegID=123051&SpecSess=&Session=
HB 4117	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.	Identical to HB 2054 (Rep. Meier)	House Referred to Rules Committee on 1/16/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4117&GAID=15&DocTypeID=HB&LegID=123055&SessionID=108&GA=101
HB 4260	Rep. Smith	BEP – Descendants of American Slavery	Requires State agencies, as defined under the Illinois State Auditing Act, to include information regarding employees who are descendants of American Slavery in reports required under the State Employment Records Act. Modifies the definition of "minority person" under the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to include Descendants of American Slavery. Defines a "Descendant of American Slaves" as a person having direct ancestral lineage to victims of chattel slavery in the United States of America. Provides that terms such as "Black," "African American," or "American Descendant of Slavery" can be used in addition to "Descendant of American Slaves."	Similar to HB 4865 (Rep. Buckner)	House Assigned to State Government Administration Committee on 3/3/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4260&GAID=15&DocTypeID=HB&LegID=123289&SessionID=108&SpecSess=&Session=&GA=101
HB 4323	Rep. Burke	SURS Trustee Status Clarification	SURS initiative that clarifies the intent of the General Assembly regarding a SURS trustee's change in status.	Identical to SB 2545 (Sen. Castro)	House Placed on Calendar Order of 2nd Reading on 3/5/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4323&GAID=15&DocTypeID=HB&LegID=123434&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 4454	Rep. Robinson	Diversity, Inclusion, and Cultural Competence Training	Requires the annual completion of a diversity, inclusion, and cultural competence training program, beginning January 1, 2021.		House Referred to Rules Committee on 2/3/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4454&GA=101&DocTypeID=HB&LegID=123957&SessionID=108
HB 4464	Rep. Skillicorn	State Spending Limitation	Sets \$31.374 billion as the State spending limitation for fiscal years 2021 through 2028. Provides that if State spending exceeds the limitation and the Governor is not presented with legislation to reduce State spending to an amount equal to or less than the limitation, then the Governor may designate amounts to be set aside as a reserve from amounts appropriated from the State general funds for all boards, commissions, agencies, institutions, authorities, colleges, universities, and bodies politic and corporate of the State. Authorizes the issuance of \$7 billion in bonds to pay vouchers incurred by the State prior to July 1, 2020.		House Referred to Rules Committee on 2/3/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4464&GA=101&DocTypeID=HB&LegID=123969&SessionID=108
HB 4483	Rep. Mazzochi	Statement of Economic Interests - Legal Representation	Requires the statement of economic interests to provide for the disclosure of any appearance as a legal representative of a client, including any such appearance by the law firm of the person filing or by anyone on behalf of the person filing, before any unit of local government or State agency.		House Referred to Rules Committee on 2/4/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4483&GA=101&DocTypeID=HB&LegID=124033&SessionID=108&SpecSess=&Session=&GA=101
HB 4580	Rep. Wehrli	Open Meetings Act - Record Open Meetings	Requires each meeting that is required to be open to the public under the Open Meetings Act to be audio recorded by the public body and maintained by the public body for at least one year after the date of the meeting.		House Assigned to State Government Administration Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4580&GA=101&DocTypeID=HB&LegID=124315&SessionID=108
HB 4594	Rep. Mazzochi	State-Funded Retirement Systems – Opt-Out	Establishes that a person who first becomes an employee after the effective date of the legislation is not required to participate in SURS. Provides that an employee may elect not to participate in SURS by notifying SURS in writing no later than 30 days after first becoming an employee. Makes similar changes under the State Employees Retirement System and Teachers Retirement System.		House Referred to Rules Committee on 2/5/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4594&GA=101&DocTypeID=HB&LegID=124339&SessionID=108

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 4618	Rep. Stava-Murray	Governmental Ethics Reforms	Creates a uniform statement of economic interests beginning with statements filed in 2020. Requires the following information to be disclosed in the uniform statement of economic interests: (1) Each asset with a value in excess of \$5,000; (2) Each source of income in excess of \$1,200 and the transaction dates for assets that generated more than \$5,000 in capital gains when sold or transferred; (3) Each creditor of a debt in excess of \$5,000; (4) Each debtor of a debt in excess of \$5,000; (5) The name of each unit of local government of which the filer was an employee, contractor, or office holder; (6) Each person known to the filer to be a registered lobbyist with any unit of government and with whom the filer has an economic or familial relationship; and (7) Each source and type of gift or honorarium valued in excess of \$500.	Nearly Identical to SB 3318 (Sen. Morrison) and Similar to HA #2 to SB 1639 (Rep. Harris) and HB 3988 (Rep. Skillicorn)	House Assigned to Executive Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4618&GAID=15&DocTypeID=HB&LegID=124363&SessionID=108&GA=101
HB 4710	Rep. Sosnowski	BEP – Employee Qualifying Business	Includes an employee qualifying business as a minority-owned business, women-owned business, and business owned by a person with a disability under the Business Enterprise for Minorities, Women, and Persons with Disabilities Act. Defines an “employee qualifying business” as a business with 50 or more full-time employees that is not 51% owned by a minority person, woman, or person with a disability, but whose employees are comprised of, at a minimum: (1) 66% minority persons; (2) 66% women; (3) 66% persons with a disability; or (4) any combination of persons identified in items (1) through (3) that amounts to 66% or higher.		House Assigned to State Government Administration Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4710&GAID=15&DocTypeID=HB&LegID=124553&SessionID=108&GA=101
HB 4712	Rep. Sosnowski	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.	Nearly Identical to HB 2740 (Rep. Morrison)	House Assigned to Personnel and Pensions Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=4712&GAID=15&DocTypeID=HB&LegID=124555&SessionID=108&GA=101
HB 4808	Rep. Wilhour	FOIA – Denial Index and Deposit of Funds	Requires a public body to include an index with each denial of a request for public records and to set aside \$7,500 for each denied request until the review process has been completed or a final order has been entered. Requires the index to include: (1) a description of the nature of the contents of each document withheld, or each deletion from a released document; (2) the date on which each document withheld was created; (3) each author and recipient of each document withheld; and (4) a statement of the exemption or exemptions claimed for each withheld document or each deletion in a released document.		House Referred to Rules Committee on 2/18/20	http://ilga.gov/legislation/billsatus.asp?DocNum=4808&GAID=15&GA=101&DocTypeID=HB&LegID=124785&SessionID=108

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 4809	Rep. Wilhour	State Officials and Employees -- Lobbyist Revolving Door	Prohibits any of the following persons from registering as a lobbyist and engaging in lobbying with members of the General Assembly for 3 years immediately following termination of that person's most recent term of office: members of the General Assembly; persons whose appointment to office is subject to the advice and consent of the Senate; and heads of departments, commissions, boards, divisions, bureaus, authorities, or other administrative units within State government who take office on or after the effective date of the legislation.		House Referred to Rules Committee on 2/18/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=4809&GAIID=15&GA=101&DocTypeID=HB&LegID=124786&SessionID=108
HB 4865	Rep. Buckner	BEP – Descendants of American Slavery	Modifies the definition of "minority person" under the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to include Descendants of American Slavery. Defines a Descendant of American Slavery as a person having direct ancestral lineage to victims of slavery in the United States of America.	Similar to HB 4260 (Rep. Smith)	House Assigned to Agency Operation Subcommittee of House State Government Administration Committee on 3/4/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=4865&GAIID=15&GA=101&DocTypeID=HB&LegID=124926&SessionID=108
HB 4944	Rep. Mason	Veterans Benefits – Honorable Discharge	Establishes that, in determining the meaning of any statute or rule or interpretation by the various administrative agencies of the State, for purposes of determining eligibility for any veterans benefit available from the State, the words "honorable discharge" and "honorably discharged" include a discharge under other than honorable conditions due to post-traumatic stress disorder, traumatic brain injury, status as a survivor of sexual assault or harassment, LGBTQ-related issues, or mental health issues, but do not include a bad conduct discharge or a dishonorable discharge.		House Assigned to Veterans Affairs Committee on 3/12/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=4944&GAIID=15&GA=101&DocTypeID=HB&LegID=125124&SessionID=108
HB 5020	Rep. Stava-Murray	FOIA - Format of Records	Requires a public body to take all reasonable steps to provide records under the Freedom of Information Act in a format that is readable by the requester, including, but not limited to, making the record available in any format that is available to the public body and requested by the requester.		House Assigned to Executive Committee on 3/12/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=5020&GAIID=15&GA=101&DocTypeID=HB&LegID=125248&SessionID=108
HB 5021	Rep. Stava-Murray	FOIA - No Fees to Certain Taxpayers	Prohibits a public body from charging a fee under the Freedom of Information Act to a requester who is a taxpayer within the jurisdiction of the public body, unless the request is made for a commercial purpose.		House Assigned to Executive Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5021&GAIID=15&DocTypeID=HB&LegID=125249&SessionID=108&Sp ecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 5022	Rep. Stava-Murray	FOIA - Extension Requirements	Allows the person making a request and the public body to agree in writing to extend the time for compliance under the Freedom of Information Act for a period to be determined by the parties only after the public body has reviewed the request, determined that an extension is necessary, and provided notification of the reasons for the extension and the date by which the response will be forthcoming.		House Assigned to Executive Committee on 3/12/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=5022&GAID=15&GA=101&DocTypeID=HB&LegID=125250&SessionID=108
HB 5370	Rep. Wilhour	Statement of Economic Interests - Additional Disclosures	Requires disclosure of the following information on statements of economic interest: (1) all businesses with which the person is associated; (2) all sources of income in excess of \$1,000; (3) securities in excess of \$5,000; (4) any known blind trust and the names of the trustees; (5) all real property and its location; (6) creditors who are owed debts of more than \$10,000; (7) leases or contracts with the State held or entered into by the person or a business with which he or she is associated; and (8) a description of any partnership, joint ownership, or similar business affiliation between: a business that is associated with the person, the person's spouse, or a relative of the person and a person who is registered under the Lobbyist Registration Act or doing business with or seeking to do business with the State.		House Referred to Rules Committee on 2/18/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5370&GAID=15&DocTypeID=HB&LegID=125982&SessionID=108&GA=101
HB 5412	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.	Nearly Identical to HB 3131 (Rep. Wehrli)	House Referred to Rules Committee on 2/18/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5412&GAID=15&DocTypeID=HB&LegID=126058&SessionID=108&SpecSess=&Session=&GA=101
HB 5445	Rep. Smith	Non-Tenured and Adjunct Faculty - State Benefits	Requires the board of trustees of each public university and community college district to provide State benefits, including health insurance and pension benefits, for adjunct faculty teaching a combined 50% workload at any combination of public higher education institutions.	Identical to SB 3766 (Sen. Fine)	House Assigned to Appropriations - Higher Education Committee on 3/3/20	http://ilga.gov/legislation/bills/tatus.asp?DocNum=5445&GAID=15&GA=101&DocTypeID=HB&LegID=126106&SessionID=108
HB 5584	Rep. E. Hernandez	Wire Transfer Tax Act	Creates the Wire Transfer Tax Act. Imposes a tax of 1% of the amount transferred on each wire transfer originating from within Illinois, beginning January 1, 2021. Requires the tax to be collected and remitted to the Illinois Department of Revenue by the financial institution that facilitates the wire transfer. Requires moneys received from the tax to be deposited into the Illinois DREAM Fund, which provides post-secondary educational scholarships to the children of immigrants.		House Assigned to Revenue and Finance Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5584&GAID=15&DocTypeID=HB&LegID=126262&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HB 5687	Rep. Harris	Governor's FY 2021 Introduced Budget	Appropriates \$1,995,767,000 to SURS for the annual required State contribution for FY 2021. (Of this amount, \$1,780,767,000 comes from the General Revenue Fund, and \$215,000,000 comes from the State Pensions Fund. This amount is equal to the amount of the annual required State contribution certified by SURS for FY 2021.) Appropriates \$7,282,374 from the Education Assistance Fund for the State's contribution to the College Insurance Program. Appropriates \$37,560,255 from the General Revenue Fund for additional State contributions to CIP for FY 2021.	Identical to SB 3950 (Sen. Harmon)	House Referred to Rules Committee on 2/25/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5687&GAID=15&DocTypeID=HB&LegID=126502&SessionID=108&SpecSess=&Session=&GA=101
HB 5746	Rep. Harris	FY 2020 Supplemental Budget	Appropriates \$50,000 from the General Revenue Fund to SURS for employer contributions required by the State as an employer in FY 2020. (These contributions are required due to the collectively bargained back wages paid to participating employees at the Department of Innovation and Technology pursuant to Public Act 101-7.)	Identical to SB 3922 (Sen. Harmon)	House Referred to Rules Committee on 2/25/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5746&GAID=15&DocTypeID=HB&LegID=126561&SessionID=108&SpecSess=&Session=&GA=101
HB 5755	Rep. Harris	FY 2021 Governor's Salary	Appropriates \$186,400 to the State Comptroller for the Governor's salary for FY 2021. (The Governor's salary for FY 2020 is \$177,500. 40 ILCS 5/15-155(j-5) requires employers to pay the employer normal cost on the portion of an employee's earnings in excess of the Governor's salary.)		Filed with the House Clerk on 3/11/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=5755&GAID=15&DocTypeID=HB&LegID=126684&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=60&GAID=15&DocTypeID=SB&LegID=114513&SessionID=108&GA=101
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.		Governor Pritzker Signed into Law as Public Act 101-0221 on 8/9/19 (Senate: 59-0-0; House: 114-0-0)	http://ilga.gov/legislation/BillStatus.asp?DocNum=0075&GAID=15&DocTypeID=SB&LegID=115041&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=178&GAID=15&DocTypeID=SB&LegID=115993&SessionID=108&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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.		Governor Pritzker Signed into Law as Public Act 101-0007 on 6/5/19 (Senate: 40-19-0; House: 83-35-0)	http://ilga.gov/legislation/bills/tatus.asp?DocNum=262&GAID=15&GA=101&DocTypeID=SB&LegID=116189&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1187&GAID=15&DocTypeID=SB&LegID=117660&SessionID=108&GA=101
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.		Governor Pritzker signed into law as Public Act 101-0546 on 8/23/19 (Senate: 58-0-1; House: 106-0-0)	http://ilga.gov/legislation/bills/tatus.asp?DocNum=1264&GAID=15&GA=101&DocTypeID=SB&LegID=117798&SessionID=108
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)	Governor Pritzker Signed into Law as Public Act 101-0321 on 8/9/19 (Senate: 55-0-0; House: 116-0-0)	http://ilga.gov/legislation/BillStatus.asp?DocNum=1265&GAID=15&DocTypeID=SB&LegID=117801&SessionID=108&GA=101
SB 1300 (ENRL)	Sen. Castro (Rep. Hoffman)	Suburban and Downstate Police/Fire Investment Consolidation	Allows Tier 2 police officers and firefighters to retire at age 60 (instead of age 67) without a reduced retirement annuity under the special formula for police officers and firefighters. Requires the Governor to designate the Chairperson of the SURS Board of Trustees (instead of the Chairperson of the Illinois Board of Higher Education automatically serving as the Chairperson of the SURS Board of Trustees). Makes a technical change related to the accelerated pension benefit payment option for Tier 1 and Tier 2 vested, inactive members.		Governor Pritzker Signed into Law as Public Act 101-0610 on 12/18/19 (Senate: 42-12-0; House: 96-14-3)	http://ilga.gov/legislation/bills/tatus.asp?DocNum=1300&GAID=15&GA=101&DocTypeID=SB&LegID=117910&SessionID=108
SB 1376	Sen. Rose	Merge ICCB and ISAC into IBHE	Merges the Illinois Community College Board and the Illinois Student Assistance Commission into the Illinois Board of Higher Education on January 1, 2020. Establishes that the rights of State employees, the State, and its agencies under the Personnel Code and applicable collective bargaining agreements and retirement plans are not affected by this change.	Nearly identical to SB 3006 (Sen. Rose)	Senate Re-Referred to Assignments Committee on 3/22/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=1376&GAID=15&DocTypeID=SB&LegID=118083&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1485&GAID=15&DocTypeID=SB&LegID=118374&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1505&GAID=15&DocTypeID=SB&LegID=118424&SessionID=108&SpecSess=&Session=&GA=101
SB 1639 (ENRL)	Sen. Steans (Rep. Harris)	Governmental Ethics Reforms	Requires the Secretary of State to create a publicly accessible and searchable database with disclosures made by registered lobbyists under the Lobbyist Registration Act, contributions made by registered lobbyists that are required to be disclosed under the Election Code, and statements of economic interests required to be filed by State officials and employees under the Illinois Governmental Ethics Act.		Governor Pritzker Signed into Law as Public Act 101-0595 on 12/5/19 (Senate: 48-0-0; House: 110-5-0)	http://ilga.gov/legislation/BillStatus.asp?DocNum=1639&GAID=15&GA=101&DocTypeID=SB&LegID=118786&SessionID=108
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.	Similar to SB 3748 (Sen. Martinez) and SB 3750 (Sen. Martinez)	House Re-Referred to Rules Committee on 11/28/19; Passed the Senate (57-0-0) on 4/10/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=1671&GAID=15&DocTypeID=SB&LegID=118848&SessionID=108&GA=101
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.		Passed the Senate (48-0-0) on 3/28/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&GAID=15&DocTypeID=SB&LegID=118913&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&GAID=15&DocTypeID=SB&LegID=118913&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
HA #2 to SB 1698	Rep. Willis	Local Government Officer Compensation Act Trailer Bill	Replaces everything after the enacting clause with provisions amending the Local Government Officer Compensation Act.		HA #2 Adopted on 10/28/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=1698&GAID=15&DocTypeID=SB&LegID=118913&SessionID=108&SpecSess=&Session=&GA=101
SB 1784 (ENRL)	Sen. Harmon (Rep. Hoffman)	Post-Janus Employee Labor Union Protections	Exempts information prohibited from being disclosed under the Illinois Pension Code from inspection and copying under the Freedom of Information Act. Prohibits a pension fund or retirement system from disclosing the following information of any members or participants of any 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 participants are members of such organization, the identity of such organization, whether or not participants pay or authorize the payment of any dues or moneys to such organization, and the amounts of such dues or moneys). Establishes that this prohibition does not apply to disclosures: (1) required under the Freedom of Information Act; (2) for purposes of conducting public operations or business; or (3) to a labor organization or other voluntary association affiliated with a labor organization or labor federation.		Governor Pritzker Signed into Law as Public Act 101-0620 on 12/20/19 (Senate: 45-9-0; House: 93-23-0)	http://ilga.gov/legislation/BillStatus.asp?DocNum=1784&GAID=15&DocTypeID=SB&LegID=119271&SessionID=108&SpecSess=&Session=&GA=101
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)	Governor Pritzker Signed into Law as Public Act 101-0010 on 6/5/19 (Senate: 52-6-0; House: 97-17-1)	http://ilga.gov/legislation/BillStatus.asp?DocNum=1814&GAID=15&DocTypeID=SB&LegID=119392&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/bills/tatus.asp?DocNum=1827&GAID=15&GA=101&DocTypeID=SB&LegID=119421&SessionID=108

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1846&GAID=15&DocTypeID=SB&LegID=119492&SessionID=108&SpecSess=&Session=&GA=101
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	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1846&GAID=15&DocTypeID=SB&LegID=119492&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1948&GAID=15&DocTypeID=SB&LegID=119852&SessionID=108&GA=101
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	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=1952&GAID=15&DocTypeID=SB&LegID=119869&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=1952&GAID=15&DocTypeID=SB&LegID=119869&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/billsatus.asp?DocNum=1952&GAID=15&GA=101&DocTypeID=SB&LegID=119869&SessionID=108

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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).	Similar to SB 3749 (Sen. Martinez)	House Re-Referred to Rules Committee on 5/10/19; Passed the Senate (56-0-0) on 4/10/19	http://ilga.gov/legislation/bills/latus.asp?DocNum=2060&GAID=15&GA=101&DocTypeID=SB&LegID=120137&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2062&GAID=15&DocTypeID=SB&LegID=120139&SessionID=108&GA=101
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	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=2062&GAID=15&DocTypeID=SB&LegID=120139&SessionID=108&SpecSess=&Session=&GA=101
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 Re-Referred to Assignments Committee on 7/3/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=2062&GAID=15&DocTypeID=SB&LegID=120139&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2145&GAID=15&DocTypeID=SB&LegID=120333&SessionID=108&GA=101

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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	http://ilga.gov/legislation/BillStatus.asp?DocNum=2165&GAID=15&DocTypeID=SB&LegID=120497&SessionID=108&SpecSess=&Session=&GA=101
SB 2545	Sen. Castro	SURS Trustee Status Clarification	SURS initiative that clarifies the intent of the General Assembly regarding a SURS trustee's change in status.	Identical to HB 4323 (Rep. Burke)	Senate Placed on Calendar Order of 3rd Reading on 2/25/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=2545&GAID=15&DocTypeID=SB&LegID=123400&SessionID=108&SpecSess=&Session=&GA=101
SB 2554	Sen. Steans	Pension Stabilization Fund - Transfers	Requires \$200 million to be transferred into the Pension Stabilization Fund when the State's bill backlog is less than \$3 billion. (Money in the Pension Stabilization Fund must be used to reduce the unfunded liabilities of the state-funded retirement systems.)		Senate Placed on Calendar Order of 3rd Reading on 3/4/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=2554&GAID=15&DocTypeID=SB&LegID=123419&SessionID=108&GA=101
SB 2747	Sen. Fine	Payment of Pension Benefits – Recovery of Legal Costs	Gives the court discretion to allow parties to a legal action concerning the payment of pension benefits to recover reasonable legal costs associated with the action.		Senate Referred to Assignments Committee on 2/4/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=2747&GAID=15&DocTypeID=SB&LegID=123699&SessionID=108&GA=101
SB 2795 (ENGR)	Sen. Martwick	Required Minimum Distribution Age Technical Correction	SURS initiative that corrects an outdated reference to the required minimum distribution age under the Internal Revenue Code.		Arrived in the House; Passed the Senate (56-0-0) on 3/4/20	http://ilga.gov/legislation/billsatus.asp?DocNum=2795&GAID=15&GA=101&DocTypeID=SB&LegID=123823&SessionID=108
SB 3004	Sen. Belt	SEGIP Re-Enrollment after Non-Payment of Premiums	Permits an annuitant, survivor, or retired employee whose coverage has been terminated for nonpayment of premiums to re-enroll in the program of group health benefits during the next annual benefit choice period, as determined by the Director of Central Management Services, if he or she has fully paid all previous nonpayments prior to that re-enrollment. Permits re-enrollment in such circumstances prior to January 1, 2022.	Similar to HA #1 to HB 139 (Rep. Greenwood)	Postponed in Senate State Government Committee on 2/19/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3004&GAID=15&DocTypeID=SB&LegID=124177&SessionID=108&SpecSess=&Session=&GA=101
SB 3006	Sen. Rose	Merge ICCB and ISAC into IBHE	Merges the Illinois Community College Board and the Illinois Student Assistance Commission into the Illinois Board of Higher Education on January 1, 2021. Establishes that the rights of State employees, the State, and its agencies under the Personnel Code and applicable collective bargaining agreements and retirement plans are not affected by this change.	Nearly identical to SB 1376 (Sen. Rose)	Postponed in Senate Higher Education Committee on 2/18/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3006&GAID=15&DocTypeID=SB&LegID=124179&SessionID=108&SpecSess=&Session=&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SB 3019	Sen. Martwick	SURS Supplemental Defined Contribution Plan – EACA	Requires the supplemental defined contribution plan to provide for an eligible automatic contribution arrangement that permits a withdrawal of default elective contributions in accordance with Section 414(w) of the Internal Revenue Code of 1986, as amended, and United States Department of Treasury regulations.		Senate Placed on Calendar Order of 3rd Reading on 2/20/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3019&GAID=15&DocTypeID=SB&LegID=124205&SessionID=108&SpecSess=&Session=&GA=101
SA #1 to SB 3019	Sen. Martwick	SURS Supplemental Defined Contribution Plan – EACA	Requires the supplemental defined contribution plan to provide for one or more automatic contribution arrangements, at least one of which shall be an eligible automatic contribution arrangement that permits a withdrawal of default elective contributions in accordance with Section 414(w) of the Internal Revenue Code of 1986, as amended, and United States Department of Treasury regulations.		SA #1 Referred to Assignments Committee on 3/5/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3019&GAID=15&DocTypeID=SB&LegID=124205&SessionID=108&SpecSess=&Session=&GA=101
SB 3061	Sen. Hastings	Repeal CMS Report	Repeals a requirement that the Department of Central Management Services prepare an annual report showing, on a fiscal year by fiscal year basis, the amount by which the State's cost for health insurance coverage for retirees of the State's universities and their survivors has declined as a result of requiring some of those retirees and survivors to contribute to the cost of their basic health insurance.		Senate Placed on Calendar Order of 2nd Reading on 3/4/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3061&GAID=15&DocTypeID=SB&LegID=124272&SessionID=108&GA=101
SB 3318	Sen. Morrison	Governmental Ethics Reforms	Creates a uniform statement of economic interests beginning with statements filed in 2020. Requires the following information to be disclosed in the uniform statement of economic interests: (1) Each asset with a value in excess of \$5,000; (2) Each source of income in excess of \$1,200 and the transaction dates for assets that generated more than \$5,000 in capital gains when sold or transferred; (3) Each creditor of a debt in excess of \$5,000; (4) Each debtor of a debt in excess of \$5,000; (5) The name of each unit of local government of which the filer was an employee, contractor, or office holder; (6) Each person known to the filer to be a registered lobbyist with any unit of government and with whom the filer has an economic or familial relationship; and (7) Each source and type of gift or honorarium valued in excess of \$500.	Nearly Identical to HB 4618 (Rep. Stava-Murray) and Similar to HA #2 to SB 1639 (Rep. Harris) and HB 3988 (Rep. Skillicorn)	Senate Referred to Assignments Committee on 2/14/20	http://ilga.gov/legislation/billsatus.asp?DocNum=3318&GAID=15&GA=101&DocTypeID=SB&LegID=124895&SessionID=108
SB 3391	Sen. Ellman	Pension Code - Noncompliance	Imposes and increases penalties for noncompliance with the Illinois Pension Code. Authorizes the Attorney General or State's Attorney to order a pension fund's compliance with the Illinois Pension Code.		Senate Referred to Assignments Committee on 2/14/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3391&GAID=15&DocTypeID=SB&LegID=125014&SessionID=108&GA=101

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Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SB 3562	Sen. Curran	Open Meetings Act - Review Minutes of Closed Meetings	Requires each public body to periodically meet to review minutes of all closed meetings every 6 months, or as soon thereafter as is practicable, taking into account the nature and meeting schedule of the public body. Requires committees that are ad hoc in nature to review closed session minutes at the later of: (1) 6 months from the date of the last review of closed session minutes or (2) at the next scheduled meeting of the ad hoc committee. Under current law, each public body must meet periodically, but no less than semi-annually, to review minutes of all closed meetings. Establishes that when a public body is dissolved, disbanded, eliminated, or consolidated by executive action, legislative action, or referendum, the governing body of the unit of local government in which the public body was located must review the closed session minutes of that public body.		Senate Assigned to Local Government Committee on 3/3/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3562&GAID=15&DocTypeID=SB&LegID=125426&SessionID=108&GA=101
SB 3600	Sen. Bennett	SURS Affected Annuitant Exemption	Exempts an employer that employs an affected annuitant to fill a posted position that has been vacant for at least 180 days from the requirement to pay the employer contribution for that annuitant for one academic year. Requires the employer to immediately notify SURS upon employing an affected annuitant under these circumstances.		Senate Assigned to Government Accountability and Pensions Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3600&GAID=15&DocTypeID=SB&LegID=125469&SessionID=108&GA=101
SB 3680	Sen. Brady	Transition from Public to Nonpublic Universities	Requires each public university in Illinois to transition into a nonpublic institution of higher education, beginning on July 1, 2020. Requires each board of trustees of a public university to develop and implement a 6-year plan for the transition that includes all of the following: (1) a date upon which the university will be deemed to be a nonpublic institution of higher education; (2) the appointment of a governing board to oversee the nonpublic university; (3) a determination of all books, records, funds, and other property that will be transferred; (4) how employees, along with their health care, retirement, and all other benefits, as well as any collective bargaining agreements, will be addressed; and (5) recommendations concerning the statutory changes needed to effectuate and reflect the transition.		Senate Referred to Assignments Committee on 2/14/20	http://ilga.gov/legislation/billsatus.asp?DocNum=3680&GAID=15&GA=101&DocTypeID=SB&LegID=125652&SessionID=108
SB 3747	Sen. Martinez	MWDBE Utilization and Sustainable Investing Continuing Education	Requires trustees to complete a minimum of two hours of continuing education regarding the requirements and obligations of Sections 1-109.1, 1-113.6, and 1-113.7 of the Illinois Pension Code. (These Sections contain requirements related to MWDBE utilization and sustainable investing.) Requires existing trustees to complete the continuing education within 6 months after the effective date of the legislation and at least once every three years thereafter. Requires new trustees to complete the continuing education training within 6 months after first becoming a trustee and at least once every three years thereafter.		Senate Assigned to Government Accountability and Pensions Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3747&GAID=15&DocTypeID=SB&LegID=125789&SessionID=108&SpecSess=&Session=&GA=101

101st General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SB 3748	Sen. Martinez	Emerging Investment Manager RFP Exemption	Exempts contracts for investment services with emerging investment managers from the competitive bidding requirements of the Illinois Pension Code.	Similar to SB 1671 (Sen. Martinez)	Senate Assigned to Government Accountability and Pensions Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3748&GAID=15&DocTypeID=SB&LegID=125792&SessionID=108&SpecSess=&Session=&GA=101
SB 3749	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).	Similar to SB 2060 (Sen. Martinez)	Senate Referred to Assignments Committee on 2/14/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3749&GAID=15&DocTypeID=SB&LegID=125795&SessionID=108&GA=101
SB 3750	Sen. Martinez	Emerging Investment Manager - Definition	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.	Similar to SB 1671 (Sen. Martinez)	Senate Referred to Assignments Committee on 2/14/20	http://ilga.gov/legislation/fulltext.asp?DocName=&SessionID=108&GA=101&DocTypeID=SB&DocNum=3750&GAID=15&LegID=125796&SpecSess=&Session=
SB 3766	Sen. Fine	Non-Tenured and Adjunct Faculty - State Benefits	Requires the board of trustees of each public university and community college district to provide State benefits, including health insurance and pension benefits, for adjunct faculty teaching a combined 50% workload at any combination of public higher education institutions.	Identical to HB 5445 (Rep. Smith)	Senate Assigned to Appropriations II Committee on 3/12/20	http://ilga.gov/legislation/billsstatus.asp?DocNum=3766&GAID=15&GA=101&DocTypeID=SB&LegID=125822&SessionID=108
SB 3810	Sen. Martwick	SURS 12 Days for Month of Service Credit	Requires a participating employee to work for at least 12 days in a month (currently, 15 days in a month) in order to receive one month of service credit.		Senate Referred to Assignments Committee on 2/14/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3810&GAID=15&DocTypeID=SB&LegID=125893&SessionID=108&GA=101

101st General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SB 3893	Sen. Villivalam	BEP - Socially Disadvantaged Individuals	Modifies the definition of a "minority person" under the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to include a person who qualifies as a socially disadvantaged individual. Defines a socially disadvantaged person as a person individually certified by the Business Enterprise Council as having been subjected to racial or ethnic prejudice or cultural bias within American society because of his or her identity as a member of a group and without regard to his or her individual qualities. Establishes that social disadvantage includes the following: (1) at least one objective distinguishing feature that has contributed to social disadvantage, such as race, ethnic origin, gender, disability, long-term residence in an environment isolated from the mainstream of American society, or other similar causes not common to individuals who are not socially disadvantaged; (2) personal experiences of substantial and chronic social disadvantage in American society; and (3) negative impact on entry into or advancement in the business world because of the disadvantage.		Senate Assigned to Executive Committee on 3/12/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3893&GAID=15&DocTypeID=SB&LegID=126192&SessionID=108&GA=101
SB 3922	Sen. Harmon	FY 2020 Supplemental Budget	Appropriates \$50,000 from the General Revenue Fund to SURS for employer contributions required by the State as an employer in FY 2020. (These contributions are required due to the collectively bargained back wages paid to participating employees at the Department of Innovation and Technology pursuant to Public Act 101-7.)	Identical to HB 5746 (Rep. Harris)	Senate Referred to Assignments Committee on 2/21/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3922&GAID=15&DocTypeID=SB&LegID=126422&SessionID=108&SpecSess=&Session=&GA=101
SB 3950	Sen. Harmon	Governor's FY 2021 Introduced Budget	Appropriates \$1,995,767,000 to SURS for the annual required State contribution for FY 2021. (Of this amount, \$1,780,767,000 comes from the General Revenue Fund, and \$215,000,000 comes from the State Pensions Fund. This amount is equal to the amount of the annual required State contribution certified by SURS for FY 2021.) Appropriates \$7,282,374 from the Education Assistance Fund for the State's contribution to the College Insurance Program. Appropriates \$37,560,255 from the General Revenue Fund to SURS for additional State contributions to CIP for FY 2021.	Identical to HB 5687 (Rep. Harris)	Senate Referred to Assignments Committee on 2/21/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=3950&GAID=15&DocTypeID=SB&LegID=126450&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=14&GAID=15&DocTypeID=HJRCA&LegID=115882&SessionID=108&GA=101
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) and HJRCA 46 (Rep. Sosnowski)	House Referred to Rules Committee on 2/13/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=0019&GAID=15&DocTypeID=HJRCA&LegID=118229&SessionID=108&SpecSess=&Session=&GA=101

101st General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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) and HJRCA 46 (Rep. Sosnowski)	House Referred to Rules Committee on 2/13/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=0020&GAID=15&DocTypeID=HJRCA&LegID=118255&SessionID=108&SpecSess=&Session=&GA=101
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); Nearly Identical to HJRCA 38 (Rep. Mazzochi)	House Referred to Rules Committee on 2/13/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=21&GAID=15&DocTypeID=HJRCA&LegID=118583&SessionID=108&GA=101
HJRCA 31	Rep. Skillicorn	No Bailout of Pensions for Elected Officials	Adds Article VIII, Section 5 to the Illinois Constitution to prohibit public funds from being expended for the purpose of a subsidy or bailout of a pension fund or retirement system for General Assembly members or constitutional officers.		House Referred to Rules Committee on 4/11/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=0031&GAID=15&DocTypeID=HJRCA&LegID=121205&SessionID=108&SpecSess=&Session=&GA=101
HJRCA 38	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 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.	Nearly Identical to HJRCA 38 (Rep. Mazzochi) and SJRCA 9 (Sen. Weaver)	House Referred to Rules Committee on 1/29/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=0038&GAID=15&DocTypeID=HJRCA&LegID=123724&SessionID=108&SpecSess=&Session=&GA=101
HJRCA 45	Rep. Sosnowski	Change Pension Benefits	Amends Article XIII, Section 5 of the Illinois Constitution to establish that a person who has not attained 65 years of age is not entitled to receive a retirement pension. Establishes that automatic annual increases to any pension cannot exceed the lesser of 2% of the pension amount or the annual unadjusted percentage increase (but not less than zero) in the consumer price index, compounded. Prohibits a pension from exceeding \$110,000 annually, except that the \$110,000 is annually increased by the lesser of 2% or the annual unadjusted percentage increase (but not less than zero) in the consumer price index, compounded.		House Referred to Rules Committee on 2/20/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=45&GAID=15&DocTypeID=HJRCA&LegID=126388&SessionID=108&GA=101
HJRCA 46	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) and HJRCA 20 (Rep. Sosnowski)	House Referred to Rules Committee on 2/26/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=46&GAID=15&DocTypeID=HJRCA&LegID=126589&SessionID=108&GA=101

101st General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SJRCA 5	Sen. Schimpf	Budget - Continuing Appropriations	Amends Article VIII, Section 2 of the Illinois Constitution to establish that if the General Assembly fails to pass a State budget by May 31st, then existing appropriations for the previous fiscal year are in effect in the new fiscal year and all subsequent fiscal years until amended or eliminated by the General Assembly.		Senate Referred to Assignments Committee on 2/13/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=5&GAID=15&DocTypeID=SJRCA&LegId=118332&SessionID=108&GA=101
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); Nearly Identical to HJRCA 38 (Rep. Mazzochi)	Senate Referred to Assignments Committee on 2/15/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=0009&GAID=15&DocTypeID=SJRCA&LegId=118819&SessionID=108&SpecSess=&Session=&GA=101
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)	http://ilga.gov/legislation/BillStatus.asp?DocNum=0016&GAID=15&DocTypeID=HJR&LegId=115111&SessionID=108&SpecSess=&Session=&GA=101
HJR 93	Rep. Harris (Sen. Castro)	Joint Commission on Ethics and Lobbying Reform	Resolves that the Joint Commission on Ethics and Lobbying Reform is created to: (1) review best practices concerning governmental ethics from local governments and other states; (2) seek input from experts and the general public concerning proposals to improve governmental ethics; and (3) review and make recommendations for changes to the State Officials and Employees Ethics Act, the Illinois Governmental Ethics Act, the Lobbyist Registration Act, the Public Officers Prohibited Activities Act, and Article 50 of the Illinois Procurement Code to improve public trust in government.		Resolution Adopted in Both Houses on 11/14/19 (House: 111-4-0; Senate: 32-18-0)	http://ilga.gov/legislation/BillStatus.asp?DocNum=0093&GAID=15&DocTypeID=HJR&LegId=122524&SessionID=108&SpecSess=&Session=&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=6&GAID=15&DocTypeID=HR&LegId=113794&SessionID=108&GA=101
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 Re-Referred to Rules Committee on 7/2/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=27&GAID=15&DocTypeID=HR&LegId=114477&SessionID=108&GA=101

101st General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
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 Re-Referred to Rules Committee on 7/2/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=32&GAID=15&DocTypeID=HR&LegID=114482&SessionID=108&GA=101
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=117&GAID=15&DocTypeID=HR&LegID=118783&SessionID=108&GA=101
HR 151	Rep. Skillicorn	Oppose Sale of Illinois Tollway	Opposes any plan to sell the Illinois Tollway. (In its introductory provisions, HR 151 refers to the potential sale of the Illinois Tollway to improve the funded status of public pensions.) Makes other resolutions.	Similar to SR 144 (Sen. T. Cullerton)	House Re-Referred to Rules Committee on 7/2/19	http://ilga.gov/legislation/BillStatus.asp?DocNum=0151&GAID=15&DocTypeID=HR&LegID=120672&SessionID=108&SpecSess=&Session=&GA=101
HR 343	Rep. E. 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	http://www.ilga.gov/legislation/BillStatus.asp?DocNum=0343&GAID=15&DocTypeID=HR&LegID=121330&SessionID=108&SpecSess=&Session=&GA=101
HR 600	Rep. Butler	Oppose Chicago + State Pension Consolidation	Resolves that the Illinois House of Representatives urges Governor Pritzker and the Illinois Pension Consolidation Feasibility Task Force, in further studying the impact of any pension consolidation proposal, to refuse any attempt to consolidate downstate and suburban pension funds with the City of Chicago or Cook County pension funds or any attempt for the State of Illinois to absorb any liability for any City of Chicago or Cook County pension funds.		House Referred to Rules Committee on 11/13/19	http://ilga.gov/legislation/billsatus.asp?DocNum=600&GAID=15&GA=101&DocTypeID=HR&LegID=122459&SessionID=108
HR 727	Rep. Sosnowski	Oppose Financial Transaction Tax	Resolves, by the Illinois House of Representatives, that they support the continued health and operation of the financial transaction markets of Illinois and oppose the concept of a privilege tax on financial transactions. Resolves that any tax of this type will be passed on to burden the savings activities of people all over the world, including Illinois workers saving for retirement.		House Assigned to Sales, Amusement, and Other Taxes Subcommittee of Revenue and Finance Committee on 2/25/20	http://ilga.gov/legislation/billsatus.asp?DocNum=727&GAID=15&GA=101&DocTypeID=HR&LegID=124549&SessionID=108
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	http://ilga.gov/legislation/BillStatus.asp?DocNum=127&GAID=15&DocTypeID=SR&LegID=120447&SessionID=108&GA=101

101st General Assembly						
Bill Number	Sponsor	Short Title	Short Summary	Notes	Status	Link
SR 144	Sen. T. Cullerton	Oppose Sale of Illinois Tollway	Resolves, by the Illinois State, that it states its firm opposition to any sale or lease of the properties of the State toll highway system and to any redirection of any portion of the tolls paid for the operation and maintenance of the State toll highway system for the enrichment of private parties. (In its introductory provisions, SR 144 indicates the belief that using the Illinois Tollway as a revenue source for Illinois' pension funds violates Article IX, Section 11 of the Illinois Constitution.) Makes other resolutions.	Similar to HR 151 (Rep. Skillicorn)	Senate Referred to Assignments Committee on 2/27/19	http://ilga.gov/legislation/bills/latus.asp?DocNum=144&GAID=15&GA=101&DocTypeID=SR&LegID=120484&SessionID=108
SR 973	Sen. McConchie	Audit of Boards and Commissions	Resolves, by the Illinois Senate, that the Illinois Auditor General is directed to conduct a management audit of the State's boards and commissions. Resolves that the audit include, but not be limited to, the following for every known State board and commission: (1) its name and purpose; (2) the number of appointed members and the number of vacancies and the length of the vacancies; (3) costs of member stipends, salaries, and per diems and expense reimbursements to members and State officials and employees for attending board and commission meetings during Fiscal Years 2019 and 2020; (4) the date of each board's or commission's meetings during Fiscal Years 2019 and 2020 and the number of members in attendance and the number of members absent; and (5) identification of any report or work product prepared and made available by the board or commission during Fiscal Years 2019 and 2020. Resolves that the Illinois Auditor General commence this audit as soon as possible and report his or her findings and recommendations upon completion.		Senate Referred to Assignments Committee on 2/4/20	http://ilga.gov/legislation/BillStatus.asp?DocNum=973&GAID=15&DocTypeID=SR&LegID=123771&SessionID=108&GA=101



MEMORANDUM

To: Legal & Legislative Committee

From: Albert J. Lee, Associate General Counsel

Date: February 28, 2020

Re: Rulemaking Update

At its meeting on January 30, 2020, the Board approved the filing of the proposed rulemakings described below for First Notice. The proposed rulemakings have concluded the pre-draft review process with the Joint Committee on Administrative Rules (“JCAR”) and are going through the First Notice publication process with the Secretary of State (“SoS”). After publication in the Illinois Register the proposed rulemakings will be open to public comment.

1. Section 1600.275 – Employer Contributions for Employing Affected Annuitants.

Section 15-139.5 of the Illinois Pension Code requires employers to pay contributions to SURS if they employ a SURS retiree who is receiving an annualized retirement annuity of at least \$10,000 and pay in excess of 40% of the retiree’s pre-retirement highest annual earnings (these retirees are called “affected annuitants”). This amendment updates the rule implementing Section 15-139.5 to conform to changes made by Public Act 100-556, effective December 8, 2017. Public Act 100-556 makes “affected annuitant” status cease if a retiree receives an annualized retirement annuity that is less than \$10,000. This change was intended to close a gap in the original \$10,000 exemption, which had become effective on June 1, 2015 – about three years after August 16, 2012 when Section 15-139.5 became law. The delayed and non-retroactive passage of the exemption resulted in a class of retirees who received less than \$10,000 per year, but who could still become affected annuitants despite the exemption.

2. Section 1600.300 – Effective Beneficiary Designations

The current rule only allows beneficiary designations to be made on paper forms bearing the member or authorized agent’s original signature. The proposed change will permit a member or his or her authorized agent to submit beneficiary designations and sign them electronically. To be valid, the electronic signature process must be one that is approved by SURS and cannot be used if a notarized signature is required under any provision of the Illinois Pension Code (*e.g.*, spousal consents for beneficiary changes under the Portable Plan).

3. Section 1600.305 – Full-Time Student Survivors Insurance Beneficiaries

Under the Traditional Plan, unmarried, full-time students can qualify for survivors insurance benefits until age 22. The current rule assesses full-time student status on an institution-by-institution basis. The proposed change will permit a student who attends two or more accredited educational institutions to be treated as a full-time student if the combined

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Rulemaking Update
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course load meets the full-time workload definition at either institution. This change permits these students to qualify for Traditional Plan survivor benefits until age 22.

4. Sections 1600.460 and 1600.461 – Vested Inactive Buyout and AAI Buyout Rules

Public Act 101-10, effective June 5, 2019, extended the ending date of the Vested Inactive Buyout and the Tier 1 Automatic Annual Increase (“AAI”) Buyout implementation period from June 30, 2021 to June 30, 2024. The conforming rule changes will extend the application deadlines to June 30, 2024. The buyouts have been offered by SURS as of July 1, 2019.

5. Miscellaneous Grammatical and Typographical Corrections

Grammatical and typographical corrections are proposed for Sections 1600.205, 1600.510, and 1600.715.

FEBRUARY COMPLIANCE REPORT (2020)

Report Owner: Compliance Officer		* indicates new requirement/change in requirement			Due < 30 days	EOQ= End of Quarter	Past Due/Missed	EOM=End of Month	Notes
Department	Report	Filed With	Frequency	Statute/Rule	Last Filed	Next Due	Status	Notes	
Administration	Travel Exception Report	IHETCB	Quarterly	80 IL 2900.105	1/3/2020	3/31/2020	Complete		
Administration	Drivers License & Insurance Certification	U of I	Annual	625 ILCS 5/7-203 & JCAR 44 Sec 5040.500	6/30/2019	6/30/2020	Complete	Note: We still need Trustee Figueroa's form.	
Administration	Certification of Board Training Requirement	DFPR-Public Pension/Insurance Div	Annual	40 ILCS 5/1/113.18	6/27/2018	6/30/2020	Complete		
Administration	Notice of Regularly Scheduled Board Meetings	SURS Lobby and SURS website	Annual	5 ILCS 120.202	Dec-19	Dec-20	Complete		
Administration	Oath of Office	Internal	Ad Hoc	40 ILCS 5/15-159(h)	As needed	As needed	Complete		
Administration	Disclosure of Appointee Interest in State Contracts	SOS	Ad Hoc	5 ILCS 420/3A.30	As needed	As needed	Complete		
Administration	Trustee Indemnification Agreements	Internal & Fiduciary Council	Ad Hoc	40 ILCS 5/1-107 & Board Governance Bylaws 1.1	As needed	As needed	Complete		
Administration	IPad User Agreements	Internal	Ad Hoc	Internal Requirement	As needed	As needed	Complete		
Audit	Deceased Annuitant Reporting	Internal	Quarterly	30 ILCS 805/8.40	12/5/2019	3/31/2020	Due < 30 days		
Audit	Fiscal Year Audit Completion Report	Internal - Filed with the Executive Director	Annual	Fiscal Control & Auditing Act	9/13/2019	9/30/2020	Complete		
Audit	FCIAA Internal Control Certification	Auditor General	Annual	FCIAA	4/25/2018	5/1/2020	Complete		
Audit	Two Year Audit Plan	Internal/ ED approval/A & R Committee	Annual	30 ILCS 10/2003	6/6/2019	6/30/2020	Complete		
Audit	Submission of System Audit (due after FY end)	Governor - submitted by SURS and by the Auditor General	Annual	State Auditing Act and 30 ILCS 5/3-14 and 40 ILCS 5/15-174	FY18 - 2/19/2019	FY19	Complete		
Finance	CAFR	Internal	Annual	40 ILCS 5/15-174	FY19 - Dec 2019	FY20	Complete		
Finance	GAAP	Comptroller	Annual (by 10/15)	PA 097-1055/ Financial Reporting Standards Board Act	final sent 9/27/2019	10/15/2020	Complete		
Finance	Public Accountability Report	Comptroller	Annual (by 11/15)	SAMS	11/15/2019	11/15/2020	Complete		
Finance	IRS Form 941-Employer Fed Tax Return Form	IRS	Quarterly	IRS CODE	1/30/2020	4/30/2020	Complete		
Finance	IRS Form 945 Annual Return of Withheld Federal Tax	IRS	Annual	IRS Code	1/31/2020	1/31/2021	Complete		
Finance	Cash Receipts and Disbursement Reports	Comptroller	Quarterly	SAMS	1/31/2020	4/30/2020	Complete		
Finance	Agency Fixed Asset Report	Comptroller	Quarterly	SAMS	1/30/2020	4/30/2020	Complete		
Finance	Accounts Receivable	Comptroller	Quarterly	SAMS	1/24/2020	4/30/2020	Complete		
Finance	Report on SMP Participation Rate	COGFA	Annual	40 ILCS 5/15-158.3	10/29/2019	11/15/2020	Complete		
Finance	Cert. of State Contribution and CIP	Governor, CMS, and Comptroller	Annual (final by 1/15)	40 ILCS 5/14A	1/7/2020	1/15/2021	Complete		
Finance	Department of Insurance Report	Pension Division of Illinois Dept. of Ins.	Annual	40 ILCS 5/1A-109	12/30/2019	12/31/2020	Complete		
Finance	IRS Form 1099R (FIRE)	IRS	Annual	IRS CODE	4/29/2019	4/1/2020	Complete	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	Complete		
Finance	Report on Voluntary Deductions	Comptroller	Annual (by 3/31)	5 ILCS 340/8	1/18/2019	3/31/2020	Complete		
Finance	Comptroller Agency Invoice	Comptroller	Annual	PA 98-0228	9/21/2017	No longer required	Complete	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	7/31/2019	7/31/2020	Complete		
Finance	5 year review of 90% funding target	COGFA	5 years	40 ICLS 1-103.3	12/31/2015	12/31/2020	Complete		
Finance	Certification of Overpayments	Internal and Board of Trustees	Determined Internally	80 Ill Adm. Code Sec.1600.450	As needed	As needed	Complete		
Finance	IRS W-3	IRS	Annual	IRS Code	1/28/2020	1/31/2021	Complete		
Finance	Information to COGFA	COGFA	Ad Hoc/At will	40 ILCS 5/22-803	As needed	As needed	Complete		
Finance	Debt Transparency Report	Comptroller	Monthly (due on the 10th)	30 ILCS 105/9.08	2/3/2020	3/10/2020	Due < 30 days		
Finance	Illinois Revised Unclaimed Property Act	Treasurer's Office	Annual report due 11/1	765 ILCS 1026/15-403	1st due 11/1/20	annually	Complete		
Finance/Mem Serv	Fin. Stmt to Participants/ Serv. Cred Stmt	Annuitants	As requested	40 ILCS 5/15-175	Ongoing	ongoing	Complete		
Finance/Mem Serv	Reports to Reciprocals	Recip Systems	As requested	40 ILCS 5/20-126	Ongoing	ongoing	Complete		
Human Resources	Separation Report	State Universities Civil Service System	Monthly (w/n 10 days EOM)	Civil Service Rule 250.30	2/7/2020	3/10/2020	Due < 30 days		
Human Resources	Monthly Wage Report	IDES taxnet Online	Monthly (EXCEPT 1/4/7/10)	IDES PA 97-0689	2/7/2020	3/31/2020	Due < 30 days		
Human Resources	Form UI-3	IDES taxnet Online	Quarterly (1/31, 4/30, 7/31/10/31)	IDES PA 97-0689	1/7/2020	4/30/2020	Complete		
Human Resources	Report of Employee Served	State Universities Civil Service System	Quarterly (w/n 10 days EOQ)	Civil Service Rule 250.30	1/7/2020	4/10/2020	Complete		
Human Resources	Exempt Employees Report	State Universities Civil Service System	Quarterly	110 ILCS 70/36e	1/7/2020	4/30/2020	Complete		
Human Resources	Occupational Ethnic and Gender Report	State Universities Civil Service System	Quarterly (w/n 10 days EOQ)	Civil Service Rule 250.3.1	1/7/2020	4/30/2020	Complete		
Human Resources	Agency Workforce Report	Secretary of State; Office of Governor	Annual	5 ILCS 410/20	12/31/2019	12/31/2020	Complete		
Human Resources	TA-2	Legislative Audit Commission	Bi-Annually	St. Fin. Act 30 ILCS 105/12-3	1/6/2020	7/31/2020	Complete		
Human Resources	I-9 Eligibility	Internal In File	Ad Hoc w/n 20 days of hire	Dept. Homeland Security	Time of Hire	As needed	Complete		

FEBRUARY COMPLIANCE REPORT (2020)

Information Technology	Data Breach Report - Personal Info Protection Act	Notice to resident "in the most expedient time possible and without unreasonable delay."	Ad Hoc	815 ILCS 530/10	Eff. 1/1/20	As needed	
Human Resources	SSA 1945	Internal In File	Ad Hoc w/n 20 days of hire	SSA	Time of Hire	As needed	
Investments		Online Surs.org	75 days after month end	Internal procedure - monthly			
Investments	Investment Update Report				Sept filed 12/16/19	Oct. due 1/15/2020	
Investments	Investments Information Report - Monthly	Online Surs.org	Monthly (by the 15th)	30 ILCS 237/10 PA 93-0499	2/14/2020	3/15/2020	
Investments	Report to Gov. on MWDB Firms/HR/Vendors	Governor	Annual	40 ILCS 5/1-109	12/19/2019	1/1/2021	
Investments	Consultant Report on MWDB searches*	SURS Board of Trustees	Annual	40 ILCS 5/1-113.22	Both - 1/31/20		
Investments	Consultant Report on Economic Opportunities*	SURS Board of Trustees	Annual	40 ILCS 5/1-113.23	Both - 1/31/20	1/1/2021	
Investments	Quinquennial Rep. US Owned Foreign Securities**	Federal Reserve Bank	Only upon request 5 years	22 USC Sec 3101	2012	Not required for 2019	
Investments	Restricted Companies Divestiture Reporting*	Illinois Investment Policy Board	Annual	40 ILCS 5/1-110.16	3/28/2019	4/1/2020	
Investments	Illinois Finance Entity/High Risk Home Loan Act Cert.	DFPR-Public Pension/Insurance Div	Annual	40 ILCS 5/1-110.10	9/26/2019	9/30/2020	
Investments	Invest in Illinois	Governor	Annual	PA 96-0753	8/29/2018	9/1/2020	
Investments	Annual SEC ADV's from Financial managers	SEC	Annual-120 days from FY end	US Investment Advisors Act of 1940	Ongoing	Ongoing	
Investments	Investment Manager Fee Disclosure	SURS.org website	Quarterly	40 ILCS 5/1-113.14	11/20/2019	3/31/2020	
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	9/1/2019	9/1/2020	
Investments	Investment Policy - Initial Filing and Updates	Illinois Department of Insurance	Ad Hoc	40 ILCS 5/1-113.17	1/30/2020	w/30 days of update	
Investments	Illinois Sustainable Investing Act Report	Illinois Department of Insurance	Annual	30 ILCS 238	1/31/2020	annually	
Legal & Ethics	Anti-Discrimination and Harassment Training for Lobbyists	OEIG	Annual	25 ILCS 170/4.7	Annually - effective 8/9/19	12/31/2020	
Legal & Ethics		Secretary of State	Annual	25 ILCS 170/4.5			
Legal & Ethics	Ethics Training for Registered Lobbyists				1/3/2019	12/31/2020	
Legal & Ethics	Lobbying Expenditure Report (20th)	Secretary of State	Monthly	25 ILCS 170/6	No longer required	No longer required	
Legal & Ethics	Lobbying Expenditure Report (5th)	Secretary of State	Monthly	25 ILCS 170/6	No longer required	No longer required	
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	6/30/2019	6/30/2020	
Legal & Ethics	Ethics Training Plan/Ethics Training State Employees- Part 1- staff only online	Office of the Inspector General	Annual	5 ILCS 430/5-10	6/28/2019	6/30/2020	
Legal & Ethics	ARDC Registration	ARDC	Annual	128 Ill.2d 351, 538 NE 2d 1152	12/31/2019	12/31/2020	
Legal & Ethics	FOIA Officer Training & Annual Certification	IAG	Annual	5 ILCS 140/3.5	Jan-19	12/31/2020	
Legal & Ethics	Ethics Officer Designation Notice	IL Executive Ethics Commission	As Needed/Ad Hoc	2 IL 1620.83	As needed	as needed	
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	

NOTE: Investments is re-vamping this report format. Reports are on hold at this time.

These are filed in the same document with the item below. Both statutes, as written, are impossible to meet. Auditors have accepted 1/31 as the due date.

*req. threshold for reporting not met for 2018. Next reporting year = 2022 and only if we meet the reporting threshold.

*not all managers are required to file by 4/1

SURS is no longer registered as a lobbyist. This item will be removed. Filed and then amended

FEBRUARY COMPLIANCE REPORT (2020)

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	BTG 12/30/2019	12/31/2020
Legal & Ethics	Annual Completed Ethics Training and Reporting- Staff and Board -online & paper format	OEIG	Annual	5 ILCS 430/5-10	12/31/2019	12/31/2020
Legal & Ethics	Ethics Orientation for State of Illinois Employees-Paper	OEIG	W/n 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	12/31/2019	12/31/2020
Legal & Ethics	Sexual Harassment Training for Staff and Trustees	OEIG	Annual	5 ILCS 450/5-10.5	12/31/2019	12/31/2020
Legal & Ethics	Anti-Discrimination and Harassment Training for Staff and Trustees	OEIG	Annual - & w/in 30 days of commencing elected or appointed position/office	5 ILCS 430/5-10.5	Annually - effective in 2020	12/31/2020

