



MINUTES

**Quarterly Meeting of the Legal & Legislative Committee
of the Board of Trustees of the
State Universities Retirement System
Friday, March 11, 2022, 1:15 p.m.
State Universities Retirement System
Via remote access only due to COVID-19 statewide restrictions**

The meetings on March 10 and 11, 2022, were conducted via video conference pursuant to the Governor's COVID-19 Disaster proclamation dated March 4, 2022, and subsection (e) of Section 7 of the Illinois Open Meetings Act. Chair John Atkinson of the SURS Board of Trustees determined that a full, in-person meeting was not practical nor prudent due to the ongoing Covid-19 disaster concerns.

The following trustees were present: Mr. John Atkinson, chair; Mr. Andriy Bodnaruk; Mr. Richard Figueroa; Dr. Fred Giertz; Mr. Scott Hendrie; Dr. Steven Rock; Mr. Collin Van Meter; Mr. Mitch Vogel; and Mr. Scott Weisbenner.

Others present: Ms. Suzanne Mayer, Executive Director; Mr. Douglas Wesley, Chief Investment Officer (CIO); Ms. Ellen Hung, Deputy CIO; Ms. Tara Myers, Chief Financial Officer; Ms. Bianca Green, General Counsel; Ms. Kristen Houch, Head of Legislative Affairs; Ms. Alicia Route, Legislative Analyst; Ms. Heather Kimmons, Associate Legal Counsel; Ms. Anna Dempsey, Investment Counsel; Mr. Albert Lee, Associate General Counsel; Ms. Jackie Hohn, Chief Internal Auditor; Ms. Brenda Dunn, Chief Human Resources Officer; Ms. Kelly Valle, Investment Officer; Ms. Tracy Bennett, Compliance Analyst; Ms. Kelly Carson, Ms. Chelsea McCarty and Ms. Annette Ackerman, Executive Assistants; and Mr. Michael Calabrese of Foley.

Legal & Legislative Committee roll call attendance was taken: Trustee Atkinson, present; Trustee Bodnaruk, present; Trustee Giertz, present; Trustee Lyons, absent; and Trustee Rock, present.

APPROVAL OF MINUTES

Trustee Rock presented the minutes from the Legal & Legislative Committee meeting of December 2, 2021.

Trustee Giertz made the following motion:

- That the minutes from the December 2, 2021 Legal & Legislative Committee meeting be approved as presented.

Trustee Bodnaruk seconded the motion which passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Bodnaruk	-	aye
Trustee Giertz	-	aye
Trustee Lyons	-	absent
Trustee Rock	-	aye

CHAIRPERSON'S REPORT

Trustee Rock reported that he and Trustee Van Meter attended the SUAA Legislative reception in Springfield on February 23, 2022. The SURS staff members who were present for the event included Suzanne Mayer, Doug Wesley, Kristen Houch and Alicia Route.

LEGISLATIVE UPDATE

Ms. Houch and Ms. Route provided the legislative update. They highlighted the status of bills that have been filed and are currently moving through the General Assembly. Discussion continued as Ms. Houch addressed questions raised by the trustees.

A copy of the report titled "Board and Website Summaries" is incorporated as part of these minutes as [Exhibit 1](#).

RULEMAKING AND COMPLIANCE UPDATE

Status of Pending Rules

Mr. Lee updated the group on the status of the Employee Definitional Rule. The new rule was approved and will become effective January 1, 2023. Mr. Lee also reviewed additional proposed rules.

A copy of the staff memorandum titled "Legal & Legislative Committee Status of Rulemaking" is incorporated as part of these minutes as [Exhibit 2](#).

Compliance Stop Light Report

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

Ms. Green reminded the trustees that their individual Statements of Economic Interests are due on or before May 2, 2022.

A copy of the report titled "February 2022 Compliance Report" is incorporated as part of these minutes as [Exhibit 3](#).

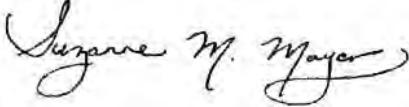
PUBLIC COMMENT

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

There was no further business brought before the committee and Trustee Giertz moved that the meeting be adjourned. The motion was seconded by Trustee Bodnaruk and the motion passed via the following roll call vote:

Trustee Atkinson	-	aye
Trustee Bodnaruk	-	aye
Trustee Giertz	-	aye
Trustee Lyons	-	absent
Trustee Rock	-	aye

Respectfully submitted,



Ms. Suzanne M. Mayer
Executive Director and Secretary, Board of Trustees

SMM:aa



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Contact: Director of Legislative and Stakeholder Relations

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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 283	Rep. Flowers	Financial Transaction Tax	Imposes a tax on the privilege of engaging in a financial transaction on any of the following exchanges or boards of trade: the Chicago Stock Exchange; the Chicago Mercantile Exchange; the Chicago Board of Trade; or the Chicago Board Options Exchange. Establishes the rate of tax as \$1 for each transaction for which the underlying asset is an agricultural product, a financial instruments contract, or an options contract. Exempts transactions executed via open outcry that are physically filled on the exchange floor from the tax. Defines a "financial transaction" as a transaction involving the purchase or sale of a stock contract, futures contract, futures options contract, swap contract, credit default swap contract, or options contract, but does not include a transaction involving securities held in a retirement account or transaction involving a mutual fund.		House Re- Referred to Rules Committee on 2/18/22
HB 447 (INTR)	Rep. Tarver	Police Felony Forfeiture - Disqualifying Offense	Prohibits benefits from being paid to any police officer who is convicted of (1) any felony related to, arising out of, or in connection with a person's service as a police officer from which the benefit derives or (2) a disqualifying offense. Defines a "disqualifying offense" as any of the following offenses set forth in the Criminal Code of 1961 or the Criminal Code of 2012 or any substantially similar offense in federal law, the Uniform Code of Military Justice, or state law: indecent solicitation of a child; sexual exploitation of a child; custodial sexual misconduct; exploitation of a child; child pornography; aggravated child pornography; first degree murder; second degree murder; predatory criminal sexual assault of a child; aggravated criminal sexual assault; criminal sexual assault; aggravated kidnaping; or aggravated battery resulting in great bodily harm or permanent disability or disfigurement. Applies to individuals who first become a police officer on or after the effective date of the legislation.	Similar to HA #1 to HB 447 (Rep. Batinick), HA #1 to HB 1429 (Rep. Tarver), and HA #3 to HB 1429 (Rep. Batinick)	House Re- Referred to Rules Committee on 2/18/22
HB 2847	Rep. Wilhour	Limit Retirement Annuity Amount	Limits the total amount of retirement annuity or pension benefits a person may receive from any pension fund or retirement system in any year to \$132,900. Increases the limit each year by the percentage increase (but not less than zero) in CPI-U, including all previous adjustments.		House Re- Referred to Rules Committee on 2/18/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 2848	Rep. Wilhour	Automatic Annual Increases in Annuities	Requires annuities to receive automatic annual increases equal to the annual unadjusted percentage increase in CPI-U, non-compounded. (Currently, Tier 1 members receive automatic annual increases equal to 3%, compounded, and Tier 2 members receive automatic annual increases equal to the lesser of 3% or 1/2 of the annual unadjusted percentage increase in CPI-U, non-compounded.)		House Re-Referred to Rules Committee on 2/18/22
HB 2849	Rep. Wilhour	Retirement Age Increase	Increases the minimum age at which a person is eligible to retire by 1 year beginning on the effective date of the legislation and by 1 additional year beginning 5 years after the effective date of the legislation. (Currently, Tier 1 members can retire at any age with at least 30 years of service, age 55 with at least 8 years of service, age 62 with at least 5 years of service, and Tier 1 police officers/firefighters can retire at age 55 with at least 20 years of service or age 50 with at least 25 years of service. Tier 2 members can retire at age 67 with at least 10 years of service or age 62 with at least 10 years of service with a lower retirement annuity, and Tier 2 police officers/firefighters can retire at age 60 with at least 20 years of service.)		House Re-Referred to Rules Committee on 2/18/22
HB 4118	Rep. Halpin	Pension Stabilization Funding	Establishes that, beginning on June 30, 2023 and for each June 30 thereafter, if the amount of the backlog of bills reported by the Comptroller 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. (Moneys in the Pension Stabilization Fund must be used to reduce the unfunded actuarially accrued liabilities of the state-funded retirement systems.)		House Re-Referred to Rules Committee on 2/18/22
HB 4209 (INTR)	Rep. Stuart	Police Service Credit Transfers	Allows a police officer to transfer service credit from SURS to a downstate police pension fund. Allows a police officer to reinstate service credit under SURS prior to the transfer by repaying a refund with interest at the rate of 6% per year from the date of the refund to the date of payment. Makes other changes.	Similar to HA #1 to HB 4209 (Rep. Stuart)	House Adopted HA #1 on 2/17/22
HA #1 to HB 4209	Rep. Stuart	Police Service Credit Transfers	Allows a police officer to make an irrevocable election between January 1, 2023 and June 30, 2023 to transfer service credit from SURS to a downstate police pension fund. Makes other changes.	Similar to HB 4209 (Rep. Stuart)	House Adopted HA #1 on 2/17/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 4209 (ENGR)	Rep. Stuart (Sen. Crowe)	Police Service Credit Transfers	Allows a police officer to make an irrevocable election between January 1, 2023 and June 30, 2023 to transfer service credit from SURS to a downstate police pension fund. Makes other changes.		Senate Referred to Assignments Committee on 3/2/22; Passed the House (104-0-1) on 3/1/22
HB 4292	Rep. Morgan (Sen. Martwick)	State Pension Obligation Acceleration Bond Authorization and Buyout Extension	Provides an additional \$1 billion in authorization for State Pension Obligation Acceleration Bonds to finance the Vested, Inactive Buyout Program and the Tier 1 Automatic Annual Increase Buyout Program ("Buyout Programs") created by Public Act 100-0587. Extends the expiration date of the Buyout Programs under SERS, SURS, and TRS for an additional 2 years from June 30, 2024 until June 30, 2026. (Currently, approximately \$117 million of the original \$1 billion in bond authorization remains to finance the Buyout Programs and the Buyouts Programs are scheduled to sunset on June 30, 2024.)		Senate Placed on Calendar Order of 2nd Reading on 3/9/22; Passed the House (108-2-0) on 2/24/22
HB 4320	Rep. Halpin (Sen. Martwick)	SURS Initiative - 6% Exemption Technical Clarification	SURS initiative that clarifies the effective date of the new 6% exemption created by Public Act 102-0016. (Illinois law (40 ILCS 5/15-155(g) requires employers to pay the present value of the increase in benefits resulting from the portion of any salary increase in excess of 6% during an employee's final rate of earnings period. Public Act 102-0016 created a new, permanent 6% exemption for overload work performed in the academic year following an academic year when the employer could not offer or allow overload work to be conducted due to an emergency declaration limiting such activities. The 6% exemption became effective on June 17, 2021 and does not cover the entire academic year 2021 without additional legislative clarification.)	Identical to SB 2992 (Sen. Martwick)	Senate Referred to Assignments Committee on 3/4/22; Passed the House (103-0-1) on 3/3/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 4321	Rep. Halpin (Sen. Martwick)	SURS Initiative - Overpayment Recovery Technical Clarification	SURS initiative that codifies longstanding practices related to the recovery of overpayments that are not attributable to a mistake in benefit calculation. (Overpayments due to a mistake in benefit calculation by the System are limited to a 3-year look-back period for recovery. It has been SURS' longstanding legal interpretation and administrative practice that overpayments that are not due to a mistake in benefit calculation by the System are not limited to a 3-year look-back period for recovery.)	Identical to SB 2991 (Sen. Martwick)	Senate Referred to Assignments Committee on 3/4/22; Passed the House (103-0-1) on 3/3/22
HB 4479	Rep. Burke	Tier 3 Implementation by July 1, 2023	Requires SERS, SURS, and TRS to implement Tier 3 pension reform by July 1, 2023.	Identical to SB 3956 (Sen. Barickman)	House Re-Referred to Rules Committee on 2/18/22
HB 4551	Rep. Slaughter	Second Chance State Contracts	Modifies the definition of "person with a disability" under the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to include a person who is a citizen or lawful permanent resident of the United States and a resident of the State of Illinois who has been arrested for committing a felony or convicted of a felony by any court of competent jurisdiction sitting in the United States or any territory of the United States.	Identical to SB 3469 (Sen. Peters)	House Re-Referred to Rules Committee on 2/18/22
HB 4738	Rep. Hammond	Survivor Health Benefits Continuing Coverage	Prohibits the participation of a dependent in the State Employees Group Insurance Program, College Insurance Program, and Teachers' Retiree Insurance Program from being suspended or terminated upon the death of the member from whom the dependent derived health benefits coverage until the dependent begins to receive an annuity as a survivor of an employee or annuitant and receives survivor health benefits.		House Re-Referred to Rules Committee on 2/18/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 4812	Rep. Scherer	Audit of Boards and Commissions	Requires the Auditor General to annually conduct a performance audit of boards and commissions, and other similar entities, that receive State funds, for the purpose of ensuring that such boards and commissions are holding meetings and performing their stated duties. Establishes that if a performance audit finds that a board or commission has not held a meeting or performed any of its stated duties within the year prior to the audit, then the board or commission must be dissolved.	Similar to HR 677 (Rep. Scherer)	House Referred to Rules Committee on 1/27/22
HA #1 to HB 4872	Rep. Durkin	Russia Divestment	Requires the Illinois Investment Policy Board to make its best efforts to identify all companies domiciled in Russia and to include those companies in the list of restricted companies distributed to each state-funded retirement system, no later than 6 months after the effective date of the legislation. Provides that if a company is no longer domiciled in Russia, the company must be removed from the list of restricted companies and is not subject to divestment unless it becomes domiciled in Russia.	Identical to HB 5705 (Rep. Durkin)	House Re-Referred HA #1 to Rules Committee on 3/4/22
HB 5258	Rep. Willis	Surviving Dependent Coverage	Requires the State Employees Group Insurance Program to pay 100% of the expenses without the imposition of any deductible or copayment for the surviving spouse and surviving dependent children of an eligible member employee who is injured in the course of employment and subsequently dies from such injuries. Requires payment of 100% of the expenses to continue for the surviving spouse until that person is remarried and for the surviving dependent children until they are not dependents. Applies retroactively to January 1, 2022.		House Re-Referred to Rules Committee on 2/18/22



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Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 5451	Rep. Halpin	Survivor Insurance Coverage	Establishes that if a deceased employee was a member of SERS, SURS, or TRS and died as a result of homicide during the course of his or her employment under SERS, SURS, or TRS, the deceased employee does not need to have met the minimum vesting requirements for the survivor to be eligible for group insurance benefits under the applicable retirement system. Applies retroactively to January 13, 2012. (Currently, in the case of a survivor who first becomes a survivor on or after January 13, 2012, the deceased employee, annuitant, or retired employee upon whom the annuity is based must have been eligible to participate in the group insurance system under the applicable retirement system for the survivor to be eligible for group insurance benefits under that system.)		House Re- Referred to Rules Committee on 2/18/22
HB 5634	Rep. Harris	Governor's Introduced Budget FY 2023	Appropriates \$2,118,567,000 to SURS for the certified State contribution for FY 2023. Of this amount, \$1,903,567,000 comes from the General Revenue Fund and \$215,000,000 comes from the State Pensions Fund. (The certified State contribution to SURS for FY 2023 is \$2,118,567,000.) Appropriates \$4,937,765 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the certified State contribution to the College Insurance Program, which provides health insurance for community college retirees. (The certified State contribution to CIP for FY 2023 is \$4,937,765.) Appropriates an additional \$50,000,000 from the General Revenue Fund to SURS for deposit into the Community College Health Insurance Security Fund.	Identical to SB 4136 (Sen. Harmon)	House Referred to Rules Committee on 2/9/22
HB 5684	Rep. Harris	Governor's Salary FY 2023 Introduced	Establishes the Governor's salary as \$190,700 for FY 2023. (The Governor's salary is \$184,800 for FY 2022. Pursuant to 40 ILCS 5/15-155(j-5), SURS employers pay the employer normal cost on the portion of an employee's earnings in excess of the Governor's salary.)	Identical to SB 4167 (Sen. Harmon)	House Referred to Rules Committee on 2/9/22



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Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HB 5705	Rep. Durkin	Russia Divestment	Requires the Illinois Investment Policy Board to make its best efforts to identify all companies domiciled in Russia and to include those companies in the list of restricted companies distributed to each state-funded retirement system, no later than 6 months after the effective date of the legislation. Provides that if a company is no longer domiciled in Russia, the company must be removed from the list of restricted companies and is not subject to divestment unless it becomes domiciled in Russia.	Identical to HA #1 to HB 4872 (Rep. Durkin)	House Referred to Rules Committee on 2/24/22
HR 677	Rep. Scherer	Audit of Boards and Commissions	Resolves that the 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 2021 and 2022; (4) the date of each of the board or commission's meetings during Fiscal Years 2021 and 2022 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 2021 and 2022.	Similar to HB 4812 (Rep. Scherer)	House Recommends Be Adopted in State Government Administration Committee on 3/9/22
HR 711	Rep. Hoffman	Urges Russian Divestment	Condemns Russia for its attack on the sovereign nation of Ukraine. Urges the review and divestment of all funds invested by any State or local unit of government, including but not limited to investments made by the State Board of Investments and any state or local retirement funds that are directly or indirectly related to Russia, to show solidarity with the people of Ukraine.		House Referred to Rules Committee on 3/4/22
SB 1900	Sen. Curran	Public-Private Partnerships Act	Creates the Public-Private Partnerships Act. Authorizes a contractor and a responsible public entity to do the following to finance a qualifying project: (1) use any and all available revenues, including public or private pension funds; and (2) access any other available funds, including public pension funds. Authorizes public funds, including public pension funds, to be used, mixed, and aggregated with funds provided by or on behalf of the contractor or other private entities for the purpose of financing a qualifying project. Makes other changes.	Similar to SA #1 to SB 1900 (Sen. Curran)	Senate Referred to Assignments Committee on 2/10/22



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SA #1 to SB 1900	Sen. Curran	Public-Private Partnerships Act	Creates the Public-Private Partnerships Act. Establishes the intent of the Act to facilitate and encourage the use of pension funds to develop qualifying projects. Authorizes a contractor and a responsible public entity to access any other funds for design, construction, operation or maintenance of qualifying project available to the responsible public entity or private entity, including public or private pension funds, for the purpose of financing a qualifying project. Authorizes public funds, including public or private pension funds, to be used and aggregated with funds provided by or on behalf of the contractor or other private entities to finance a qualifying project. Makes other changes.	Similar to SB 1900 (Sen. Curran)	Senate Re-Referred to Assignments Committee on 2/10/22
SB 2478	Sen. Villivalam	Socially and Economically Disadvantaged Persons	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 person and a person who qualifies as an economically disadvantaged. 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. Defines an "economically disadvantaged person" as a socially disadvantaged person whose ability to compete in the free enterprise system has been impaired due to diminished capital and credit opportunities as compared to others in the same or similar line of business who are not socially disadvantaged.		Senate Re-Referred to Assignments Committee on 2/10/22
SB 2991	Sen. Martwick (Rep. Halpin)	SURS Initiative - Overpayment Recovery Technical Clarification	SURS initiative that codifies longstanding practices related to the recovery of overpayments that are not attributable to a mistake in benefit calculation. (Overpayments due to a mistake in benefit calculation by the System are limited to a 3-year look-back period for recovery. It has been SURS' longstanding legal interpretation and administrative practice that overpayments that are not due to a mistake in benefit calculation by the System are not limited to a 3-year look-back period for recovery.)	Identical to HB 4321 (Rep. Halpin)	House Assigned to Personnel and Pensions Committee on 3/7/22; Passed the Senate (53-0-0) on 2/23/22



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SB 2992	Sen. Martwick	SURS Initiative - 6% Exemption Technical Clarification	SURS initiative that clarifies the effective date of the new 6% exemption created by Public Act 102-0016. (Illinois law (40 ILCS 5/15-155(g) requires employers to pay the present value of the increase in benefits resulting from the portion of any salary increase in excess of 6% during an employee's final rate of earnings period. Public Act 102-0016 created a new, permanent 6% exemption for overload work performed in the academic year following an academic year when the employer could not offer or allow overload work to be conducted due to an emergency declaration limiting such activities. The 6% exemption became effective on June 17, 2021 and does not cover the entire academic year 2021 without additional legislative clarification.)	Identical to HB 4320 (Rep. Halpin)	Senate Referred to Assignments Committee on 1/5/22
SB 3046	Sen. Martwick	Part-Time and Adjunct Faculty Benefits	Makes changes related to pension benefits, with a specific focus on part-time and adjunct faculty. Establishes that one day of service in a calendar month constitutes a full month of service credit. Establishes that a participant who teaches a course or courses is deemed to be in service until the date on which the employer requires grades for that course or courses to be submitted and that date is a day of service (and constitutes a full month of service credit). (Applies retroactively to two years before the effective date of the legislation, and allows a participant to request that SURS recalculate his or her service based on this change.) Requires SURS to annually provide the formula for calculating pension benefits to any employee who is not a full-time employee. Requires each employer to annually provide to its participating employees a statement of the amount of service the employer reported to SURS for that participating employee during the preceding academic year. Provides that if a person disputes the amount of any benefit payment, the amount of service credit the benefit was based on, the formula used to calculate the benefit, the calculation of the benefit, or the information provided to SURS by the employer, he or she may, within 90 days after the commencement of the benefit, apply to SURS in writing for a recalculation.	Similar to SB 44 (Sen. Martwick)	Senate Referred to Assignments Committee on 1/5/22



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SA #1 to SB 3197	Sen. D. Turner	Survivor Health Benefits	Establishes that in the case of a survivor who is entitled to or currently receiving occupational death benefits pursuant to the deceased employee's applicable retirement system and first becomes a survivor on or after January 1, 2022, the survivor is eligible for group health insurance benefits regardless of the deceased employee's minimum vesting requirements under the applicable retirement system, with a State contribution rate of 100%, until an unmarried child dependent reaches the age of 18, or the age of 22 if the dependent child is a full-time student, or until the adult survivor becomes eligible for benefits under Medicare. Establishes that the changes made by the legislation with respect to survivors who first became survivors prior to January 1, 2022 apply upon request of the survivor on or after the effective date of the legislation. Applies to survivors of SERS and SURS employees participating in the State Employees Group Insurance Program.		Senate Adopted SA #1 on 2/23/22
SB 3197 (ENGR)	Sen. D. Turner (Rep. McCombie)	Survivor Health Benefits - Occupational Death of Employee	Establishes that, in the case of a survivor who is entitled to or currently receiving occupational death benefits pursuant to the deceased employee's applicable retirement system, the survivor is eligible for group health insurance benefits regardless of the deceased employee's minimum vesting requirements under the applicable retirement system, with a State contribution rate of 100%, until an unmarried child dependent reaches the age of 18, or the age of 22 if the dependent child is a full-time student, or until the adult survivor becomes eligible for benefits under Medicare. Establishes that the changes made by the legislation with respect to survivors who first became survivors prior to January 1, 2022 apply upon request of the survivor on or after the effective date of the legislation. Applies to survivors of SERS and SURS employees participating in the State Employees Group Insurance Program.		House Assigned to Personnel and Pensions Committee on 3/7/22; Passed the Senate (50-0-0) on 2/23/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
HA #1 to SB 3197	Rep. McCombie	Survivor Health Benefits - Occupational Death of Employee	Establishes that, in the case of a survivor who is entitled to or currently receiving occupational death benefits pursuant to the deceased employee's applicable retirement system or death benefits pursuant to the Illinois Workers' Compensation Act, the survivor is eligible for group health insurance benefits regardless of the deceased employee's minimum vesting requirements under the applicable retirement system, with a State contribution rate of 100%, until an unmarried child dependent reaches the age of 18, or the age of 22 if the dependent child is a full-time student, or until the adult survivor becomes eligible for benefits under Medicare. Establishes that the changes made by the legislation with respect to survivors who first became survivors prior to January 1, 2022 apply upon request of the survivor on or after the effective date of the legislation. Applies to survivors of SERS and SURS employees participating in the State Employees Group Insurance Program.		House Referred HA #1 to Rules Committee on 3/8/22
SB 3469	Sen. Peters	Second Chance State Contracts	Modifies the definition of "person with a disability" under the Business Enterprise for Minorities, Women, and Persons with Disabilities Act to include a person who is a citizen or lawful permanent resident of the United States and a resident of the State of Illinois who has been arrested for committing a felony or convicted of a felony by any court of competent jurisdiction sitting in the United States or any territory of the United States.	Identical to HB 4551 (Rep. Slaughter)	Senate Re-Referred to Assignments Committee on 2/10/22
SB 3653	Sen. Martwick	Pension Systems Employee Revolving Door	Prohibits an individual who is an employee of a pension fund, investment board, or retirement system from serving as a trustee of that pension fund, investment board, or retirement system within 12 months after his or her termination of employment.		Senate Referred to Assignments Committee on 1/21/22



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www.surs.org

Legislative Report: Statutes Last Updated 3/9/22

Contact: Director of Legislative and Stakeholder Relations

Please note: SURS does not endorse specific pension reform legislation. Our goal is to update and educate SURS members concerning legislation that may affect their retirement benefits.

102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
SB 3654	Sen. Martwick	Deferred Compensation Plans - Prevent Cross-Selling	Establishes that, in administering the deferred compensation plan, SURS must require that the deferred compensation plan recordkeeper agree that, in performing services with respect to the deferred compensation plan, the recordkeeper: (1) will not use information received as a result of providing services with respect to the deferred compensation plan or the participants in the deferred compensation plan to solicit the participants in the deferred compensation plan for the purpose of cross-selling nonplan products and services, unless in response to a request by a participant in the deferred compensation plan; and (2) will not promote, recommend, endorse, or solicit participants in the deferred compensation plan to purchase any financial products or services outside of the deferred compensation plan. Makes similar changes to deferred compensation plans administered by TRS, ISBI (the State Employees Deferred Compensation Plan), local governments, school districts, and public institutions of higher education.		Senate Re-Referred to Assignments Committee on 2/10/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
SB 3689	Sen. Martwick	Tier 2 Changes	Increases the Tier 2 pensionable earnings annually by the greater of 3% or the annual unadjusted percentage increase in CPI-U, including all previous adjustments, beginning in 2022. (Currently, the Tier 2 pensionable earnings limit increases by the lesser of 3% or 1/2 of the annual unadjusted percentage increase in CPI-U, including all previous adjustments.) Modifies the Tier 2 final rate of earnings period to be the highest 6 consecutive years out of the last 10 years of employment. (Currently, the Tier 2 final rate of earnings period is the highest 8 consecutive years out of the last 10 years of employment.) Establishes that a Tier 2 member is entitled to retirement at: age 60 with at least 35 years of service credit (not including service credit for unused, unpaid sick leave); age 62 with at least 10 years of service credit (not including service credit for unused, unpaid sick leave); or age 64 with at least 10 years of service credit (including service credit for unused, unpaid sick leave). (Currently, a Tier 2 member can retire at age 67 with at least 10 years of service credit or age 62 with at least 10 years of service credit, but with a lower retirement annuity.) Modifies the Tier 2 automatic annual increase in retirement annuity to be the greater of 3% or 1/2 of the annual percentage increase in CPI-U, non-compounded. (Currently, the Tier 2 automatic annual increase in retirement annuity is the lesser of 3% or 1/2 of the annual percentage increase in CPI-U, non-compounded.) Makes similar changes for Tier 2 members under TRS and for Tier 2 members who are educational employees under the IMRF.	Similar to SB 3979 (Sen. Sims)	Senate Referred to Assignments Committee on 1/21/22
SB 3956	Sen. Barickman	Tier 3 Implementation by July 1, 2023	Requires SERS, SURS, and TRS to implement Tier 3 pension reform by July 1, 2023.	Identical to HB 4479 (Rep. Burke)	Senate Referred to Assignments Committee on 1/21/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
SB 3979	Sen. Sims	Tier 2 Changes	Increases the Tier 2 pensionable earnings annually by the greater of 3% or the annual unadjusted percentage increase in CPI-U, including all previous adjustments, beginning in 2022. (Currently, the Tier 2 pensionable earnings limit increases by the lesser of 3% or 1/2 of the annual unadjusted percentage increase in CPI-U, including all previous adjustments.) Modifies the Tier 2 final rate of earnings period to be the highest 6 consecutive years out of the last 10 years of employment. (Currently, the Tier 2 final rate of earnings period is the highest 8 consecutive years out of the last 10 years of employment.) Establishes that a Tier 2 member is entitled to retirement at: age 60 with at least 35 years of service credit (not including service credit for unused, unpaid sick leave); age 62 with at least 10 years of service credit (not including service credit for unused, unpaid sick leave); or age 64 with at least 10 years of service credit (including service credit for unused, unpaid sick leave). (Currently, a Tier 2 member can retire at age 67 with at least 10 years of service credit or age 62 with at least 10 years of service credit, but with a lower retirement annuity.) Modifies the Tier 2 automatic annual increase in retirement annuity to be the greater of 3% or 1/2 of the annual percentage increase in CPI-U, non-compounded. (Currently, the Tier 2 automatic annual increase in retirement annuity is the lesser of 3% or 1/2 of the annual percentage increase in CPI-U, non-compounded.) Makes similar changes for Tier 2 members under TRS and for Tier 2 members who are educational employees under the IMRF.	Similar to SB 3689 (Sen. Martwick)	Senate Referred to Assignments Committee on 1/21/22
SB 4136	Sen. Harmon	Governor's Introduced Budget FY 2023	Appropriates \$2,118,567,000 to SURS for the certified State contribution for FY 2023. Of this amount, \$1,903,567,000 comes from the General Revenue Fund and \$215,000,000 comes from the State Pensions Fund. (The certified State contribution to SURS for FY 2023 is \$2,118,567,000.) Appropriates \$4,937,765 from the Education Assistance Fund to SURS for deposit into the Community College Health Insurance Security Fund for the certified State contribution to the College Insurance Program, which provides health insurance for community college retirees. (The certified State contribution to CIP for FY 2023 is \$4,937,765.) Appropriates an additional \$50,000,000 from the General Revenue Fund to SURS for deposit into the Community College Health Insurance Security Fund.	Identical to HB 5634 (Rep. Harris)	Senate Referred to Assignments Committee on 2/7/22



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102nd General Assembly - Bill Actions in the 2nd Year

Bill Number	Sponsor(s)	Short Title	Short Summary	Notes	Status
SB 4167	Sen. Harmon	Governor's Salary FY 2023 Introduced	Establishes the Governor's salary as \$190,700 for FY 2023. (The Governor's salary is \$184,800 for FY 2022. Pursuant to 40 ILCS 5/15-155(j-5), SURS employers pay the employer normal cost on the portion of an employee's earnings in excess of the Governor's salary.)	Identical to HB 5684 (Rep. Harris)	Senate Referred to Assignments Committee on 2/15/22
SJRC 14	Sen. McConchie	Citizen Initiative for Constitutional Amendments	Amends Article XIV, Section 3 of the Illinois Constitution to allow amendments to the Illinois Constitution to be proposed by a petition signed by a number of electors equal in number to at least 8% of the total votes cast for candidates for Governor in the preceding gubernatorial election. Prevents this process from being used for the proposal, modification, or repeal of any portion of the Bill of Rights or to modify the initiative process for proposing amendments to the Illinois Constitution.	Identical to SJRC 1 (Sen. McConchie) and HJRC 5 (Rep. Batinick)	Senate Referred to Assignments Committee on 1/14/22
SJRC 15	Sen. McConchie	Referendum on Legislation	Creates Article IV, Section 16 of the Illinois Constitution to allow a referendum to reject any Public Act, except for appropriations measures, passed by the General Assembly and enacted into law to be proposed by a petition signed by a number of electors equal in number to at least 5% of the total votes cast for Governor in the preceding gubernatorial election. Requires the petition to be signed by the petitioning electors and filed with the State Board of Elections not more than 90 days after the enactment of the Public Act.	Identical to SJRC 2 (Sen. McConchie) and HJRC 6 (Rep. Batinick)	Senate Referred to Assignments Committee on 1/14/22



MEMORANDUM

To: Legal & Legislative Committee
From: Albert J. Lee, Associate General Counsel
Date: February 24, 2022
Re: Status of Rulemakings

I. Final Adoption of Employee Definitional Rule

On January 18, 2022, the Secretary of State confirmed SURS' adoption of a new rulemaking under Title 80, Part 1600, Section 1600.200 of the Illinois Administrative Code (80 Ill. Adm. Code § 1600.200). That section defines what an "employee" is for SURS purposes. The term "employee" determines who is eligible to participate in the SURS retirement, deferred compensation, and disability plans. The final rule was published in the Illinois Register on January 28, 2022, in Volume 46, Issue 5, page 1883. SURS is currently developing educational materials and planning seminars for employers to aid in their implementation efforts. The rule will become effective for employments beginning on or after January 1, 2023.

II. Proposed Rulemakings

At the December 2021 Board meetings, the Board approved the several rule amendments regarding the following topics:

- Section 1600.150 Group Trust Provisions
- Section 1600.450 Overpayment Recovery
- Section 1600.500 Administrative Staff Determination and Rules for Appeal – Nature and Requirements for Formal Hearings
- Section 1600.510 Employer-Related Determinations and Rules for Appeal

On December 17, 2021, SURS staff submitted the Board-approved language for pre-filing review with the Joint Committee on Administrative Rules (JCAR). JCAR provided the pre-draft review in a letter dated January 24, 2022, with several stylistic and clarifying suggestions. SURS staff is currently working on incorporating the suggestions in the draft rulemaking prior to filing for First Notice. The filing is anticipated to occur in March 2022. Final adoption is anticipated to occur sometime in summer 2022.

FEBRUARY COMPLIANCE REPORT (2022)

Report Owner: Compliance Officer		* indicates new requirement/change in requirement			Complete/Next due > 30 days	Due < 30 days	Past Due/Missed	
Department	Report	Filed With	Frequency	Statute/Rule	Last Filed	Next Due	Status	Notes
Administration	Travel Exception Report	IHETCB	Quarterly	80 IL 2900.105	12/21/2021	3/31/2022		
Administration	Drivers License & Insurance Certification	U of I	Annual	625 ILCS 5/7-203 & JCAR 44 Sec 5040.500	6/30/2021	6/30/2022		
Administration	Certification of Board Training Requirement	DFPR-Public Pension/Insurance Div	Annual	40 ILCS 5/1/113.18	7/6/2021	6/30/2022		
Administration	Notice of Regularly Scheduled Board Meetings	SURS Lobby and SURS website	Annual	5 ILCS 120.202	Sep-21	Dec-22		
Administration	Oath of Office	Internal	Ad Hoc	40 ILCS 5/15-159(h)	As needed	As needed		
Administration	Disclosure of Appointee Interest in State Contracts	SOS	Ad Hoc	5 ILCS 420/3A.30	As needed	As needed		
Administration	Trustee Indemnification Agreements	Internal & Fiduciary Council	Ad Hoc	40 ILCS 5/1-107 & Board Governance Bylaws 1.1	As needed	As needed		
Administration	IPad User Agreements	Internal	Ad Hoc	Internal Requirement	As needed	As needed		
Audit	Deceased Annuitant Reporting	Internal	Quarterly	30 ILCS 805/8.40	12/2/2021	3/31/2022		
Audit	Fiscal Year Audit Completion Report	Internal - Filed with the Executive Director	Annual	Fiscal Control & Auditing Act	9/9/2021	9/30/2022		
Audit	FCIAA Internal Control Certification	Auditor General	Annual	FCIAA	4/29/2021	5/1/2022		
Audit	Two Year Audit Plan	Internal/ ED approval/A & R Committee	Annual	30 ILCS 10/2003	6/30/2021	6/30/2022		
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	FY19 - 3/10/2020	FY20		
Finance	Annual Financial Report	Internal	Annual	40 ILCS 5/15-174	FY21 - Dec 2020	FY22		
Finance	GAAP	Comptroller	Annual (by 10/15)	PA 097-1055/ Financial Reporting Standards Board Act	Prelim filed 9/24/2021 - Final due when final numbers are done - final filed 10/22/2021	10/15/2022		
Finance	Public Accountability Report	Comptroller	Annual (by 11/15)	SAMS	12/15/2021	12/15/2022		
Finance	IRS Form 941-Employer Fed Tax Return Form	IRS	Quarterly	IRS CODE	1/25/2022	4/30/2022		
Finance	IRS Form 945 Annual Return of Withheld Federal Tax	IRS	Annual	IRS Code	1/31/2022	1/31/2023		
Finance	Cash Receipts and Disbursement Reports	Comptroller	Quarterly	SAMS	1/31/2022	4/30/2022		
Finance	Agency Fixed Asset Report	Comptroller	Quarterly	SAMS	1/31/2021	4/30/2022		
Finance	Accounts Receivable	Comptroller	Quarterly	SAMS	1/31/2021	4/30/2022		
Finance	Report on SMP Participation Rate	COGFA	Annual	40 ILCS 5/15-158.3	10/26/2021	11/15/2022		
Finance	Cert. of State Contribution and CIP	Governor, CMS, and Comptroller	Annual (final by 1/15)	40 ILCS 5/14A	12/14/2020	1/15/2023		
Finance	Department of Insurance Report	Pension Division of Illinois Dept. of Ins.	Annual	40 ILCS 5/1A-109	12/28/2021	12/31/2022		
Finance	IRS Form 1099R (FIRE)	IRS	Annual	IRS CODE	4/1/2021	4/30/2022		
Finance	IRS 1042: Withholding US income of Foreign Persons	IRS	Annual	IRS CODE	3/23/2021	3/15/2022		Extn. Received
Finance	Report on Voluntary Deductions	Comptroller	Annual (by 3/31)	5 ILCS 340/8	3/3/2021	3/31/2022		
Finance	Comptroller Agency Invoice	Comptroller	Annual	PA 98-0228	9/21/2017	No longer required		By law, we file monthly Debt Transparency Reports instead.
Finance	Fee Imposition Report	to Comptroller who sends to Gen. Assembly by 9/1	Annual - to Comptroller by 7/31; Comptroller to GA by 9/1	15 ILCS 405/16.2	7/13/2021	7/31/2022		
Finance	5 year review of 90% funding target	COGFA	5 years	40 ICLS 1-103.3	10/27/2021	12/31/2026		The ED sends a letter to COGFA on this issue.
Finance	Certification of Overpayments	Internal and Board of Trustees	Determined Internally	80 Ill Adm. Code Sec.1600.450	As needed	As needed		
Finance	IRS W-3	IRS	Annual	IRS Code	1/21/2022	1/31/2023		
Finance	Information to COGFA	COGFA	Ad Hoc/At will	40 ILCS 5/22-803	As needed	As needed		
Finance	Debt Transparency Report	Comptroller	Monthly (due on the 10th)	30 ILCS 105/9.08	2/10/2022	3/10/2022		
Finance	Illinois Revised Unclaimed Property Act	Treasurer's Office	Annual report due 11/1	765 ILCS 1026/15-403	6/10/2021*	11/1/2022		*Partial information provided. Additional data will be forthcoming to supplement our initial report.
Finance/Mem Serv	Fin. Stmt to Participants/ Serv. Cred Stmts	Annuitants	As requested	40 ILCS 5/15-175	Ongoing	ongoing		
Finance/Mem Serv	Reports to Reciprocals	Recip Systems	As requested	40 ILCS 5/20-126	Ongoing	ongoing		
Human Resources	Separation Report	State Universities Civil Service System	Monthly (w/n 10 days EOM)	Civil Service Rule 250.30	2/2/2022	3/10/2022		

FEBRUARY COMPLIANCE REPORT (2022)

Human Resources	Monthly Wage Report	IDES taxnet Online	Monthly (EXCEPT 1/4/7/10)	IDES PA 97-0689	2/15/2022	3/31/2022	
Human Resources	Form UI-3	IDES taxnet Online	Quarterly (1/31, 4/30, 7/31/10/31)	IDES PA 97-0689	1/24/2022	4/30/2022	
Human Resources	Report of Employee Served	State Universities Civil Service System	Quarterly (w/n 10 days EOO)	Civil Service Rule 250.30	1/9/2022	4/10/2022	
Human Resources	Exempt Employees Report	State Universities Civil Service System	Quarterly	110 ILCS 70/36e	1/9/2022	4/30/2022	
Human Resources	Occupational Ethnic and Gender Report	State Universities Civil Service System	Quarterly (w/n 10 days EOO)	Civil Service Rule 250.3.1	1/9/2022	4/30/2022	
Human Resources	Agency Workforce Report	Secretary of State; Office of Governor	Annual	5 ILCS 410/20	12/27/2021	12/31/2022	
Human Resources	TA-2	Legislative Audit Commission	Bi-Annually	St. Fin. Act 30 ILCS 105/12-3	1/4/2022	7/31/2022	
Human Resources	I-9 Eligibility	Internal In File	Ad Hoc w/n 20 days of hire	Dept. Homeland Security	Time of Hire	As needed	
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	Investment Update Report	Online Surs.org	75 days after month end	Internal procedure - monthly	Dec posted 2/28/22	Jan due 3/15/2022	These reports are often delayed - waiting for private equity information
Investments	Investments Information Report - Monthly	Online Surs.org	Monthly (by the 15th)	30 ILCS 237/10 PA 93-0499	2/15/2022	3/15/2022	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.
Investments	Report to Gov. on MWDB Firms/HR/Vendors	Governor	Annual	40 ILCS 5/1-109	12/9/2021	1/1/2023	
Investments	Consultant Report on MWDB searches*	SURS Board of Trustees	Annual	40 ILCS 5/1-113.22	Both - 12/16/21	1/1/2023	
Investments	Consultant Report on Economic Opportunities*	SURS Board of Trustees	Annual	40 ILCS 5/1-113.23	Both - 12/16/21	1/1/2023	
Investments	Quinquennial Rep. US Owned Foreign Securities**	Federal Reserve Bank	Only upon request 5 years	22 USC Sec 3101	2012	Not due until 2022	*req. threshold for reporting not met for 2018. Next reporting year = 2022 and only if we meet the reporting threshold.
Investments	Restricted Companies Divestiture Reporting*	Illinois Investment Policy Board	Annual	40 ILCS 5/1-110.16	4/1/2021	4/1/2022	*not all managers are required to file by 4/1
Investments	Illinois Finance Entity/High Risk Home Loan Act Cert.	DFPR-Public Pension/Insurance Div	Annual	40 ILCS 5/1-110.10	8/20/2021	9/30/2022	
Investments	Invest in Illinois	Governor	Annual	PA 96-0753	8/31/2021	9/1/2022	
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	12/30/2021	3/31/2022	
Investments	Written Investment Policies	Illinois Department of Insurance	Ad Hoc	40 ILCS 5/1-113.6	As needed	As needed	
Investments	IS Policy Exemptions, Forms and Contract Summaries	Illinois Procurement Policy Board	Ad Hoc	40 ILCS 5/1-113.14	As needed	As needed	
Investments	Qualified FOF Mgmt. Services Contract Summaries	SURS.org website	Ongoing	40 ILCS 5/1-113.15	As needed	As needed	
Investments	Annual Certification of Fiduciary Duty and Insurance	Internal on file	Annual	contract provision	8/31/2021	9/1/2022	
Investments	Investment Policy - Initial Filing and Updates	Illinois Department of Insurance	Ad Hoc	40 ILCS 5/1-113.17	9/28/2021	w/30 days of update	
Investments	Illinois Sustainable Investing Act - Inv. Policy New Requirements (eff. 1-1-2020)	Illinois Department of Insurance	Ad Hoc	30 ILCS 238 and 40 ILCS 5/1-113.17	1/31/2020	w/30 days of update	New statute requires inv. policy to include sustainability factors
Legal & Ethics	Anti-Discrimination and Harassment Training for Lobbyists	OEIG	Annual	25 ILCS 170/4.7	No longer required	No longer required	
Legal & Ethics	Ethics Training for Registered Lobbyists	Secretary of State	Annual	25 ILCS 170/4.5	No longer required	No longer required	
Legal & Ethics	Lobbying Expenditure Report (20th)	Secretary of State	Monthly	25 ILCS 170/6	No longer required	No longer required	SURS is no longer registered as a lobbyist. This item will be removed.

FEBRUARY COMPLIANCE REPORT (2022)

Legal & Ethics	Lobbyist Registration Act Exemption Letter	Secretary of State	Annual	25 ILCS 170/3(a)(4 and 5) and 2 Ill. Admin. Code Sec. 560.210(e-f)	1/27/2021	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	5/1/2021	5/1/2022
Legal & Ethics	Annual Ethics Training for Trustees	Internal-Cert of Completion by ED to Division of Insurance of the Department of Financial and Professional Regulation	Annual (to be completed by 6/30)	5 ILCS 430/5-10	7/6/2021	6/30/2022
Legal & Ethics	Ethics Training Plan/Ethics Training State Employees-Part 1- staff only online	SURS Internal Auditor - OEIG at end of year	Annual	5 ILCS 430/5-10	6/30/2021	6/30/2022
Legal & Ethics	ARDC Registration	ARDC	Annual	128 Ill.2d 351, 538 NE 2d 1152	12/31/2021	12/31/2022
Legal & Ethics	FOIA Officer Training & Annual Certification	IAG	Annual	5 ILCS 140/3.5	Dec-21	12/31/2022
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
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	12/31/2021	12/31/2022
Legal & Ethics	Annual Completed Ethics Training and Reporting- Staff and Board -online & paper format	OEIG	Annual	5 ILCS 430/5-10	12/31/2021	12/31/2022
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	12/31/2021	12/31/2022
Legal & Ethics	Sexual Harassment Training for Staff and Trustees	OEIG	Annual	5 ILCS 450/5-10.5	12/31/2021	12/31/2022
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	12/31/2021	12/31/2022

We sent this letter as a courtesy to inform that SURS is no longer a registered lobbyist.