

# **IBEW 965 Retiree Club**

## **Meeting Minutes**

October 17, 2011

### **I. Call to order**

**Gene Samuelson**

**IBEW 965 Retiree Club at 9:10AM on October 17, 2011 in At Sam and Maddie's Restaurant in Dodgeville, WI.**

### **II. Roll call**

58 Retiree Members Present

Pledge of Allegiance led by Curt Steindorf.

Welcome and invitation to join club by Lori Richardson

### **III. Open issues**

**Marcia Whelan** from Alliant Energy gave Benefits Update.

- Enrollment October 3 to December 7, 2011 with Extend Health for over 65 retirees.
- Extend Health is only vendor that can be used.
  - Must use Extend Health to receive company credits.
  - Annual credit is \$2000.
  - Between 65 and 74 receive an additional (one time only) \$500 credit.
  - Between 75 and 79 receive an additional (one time only) \$1000 credit.
  - Between 80 and over receive an additional (one time only) \$1500 credit.
  - Will receive an extra \$500 credit if you will be 65 before January 1<sup>st</sup>.
- Retirees will have to pay the premiums and then file claim form with Extend Health.
  - Some plans have auto-reimbursement.
  - Retirees may pay premiums with direct withdrawal from a credit card.
  - Retirees may pay premiums annually if the insurance company selected allows this.
  - HRA funds go into one account for each retiree (or couple), if both over 65.
  - Health Savings Account does not have to be claimed on taxes.
  - Health Savings Account until the account balance is at -0-.
  - Credit to Health Savings Account will be done on January 1<sup>st</sup> of each year.
  - Unused credit will roll over into the next benefit year.
  - Will lose funds if you chose to drop out of the Extend Health Program.
  - Retirees need to be enrolled in a group plan before December 31, 2011.
  - Alliant Energy is attempting to contact all retirees that still have coverage; advise everyone to contact Employee Benefits.
  - If you will turn 65 during the year Extend Health will contact 30 – 90 days before birthday.

- The role of Extend Health is to provide advice of best plans for individual needs.
- Notify Company Benefits if choices are not offered.
- Can ask for different advisor or request the same.
- Once on a plan, you are on that plan for 1 year, unless circumstances change.
- Surviving spouse may see less for premiums.
- If you want AARP they will hand you off; you still qualify for the company credit.
- Should have 2012 prices online; prices just came out, if discrepancies occur contact your benefit advisor.
- Some regional providers are not in the Extend Health Program; Dean, Physicians Plus, etc.
- Take time to make sure benefits covers drugs; big changes.
- Insurance Company will send written material on coverage.
- Extend Health will send card & HAS information in December.
- Some people still do not know that enrollment must go to Extended Health to get HAS.
- Retirees can change Part D drug plan from year to year.
- Anything other than routine eye coverage is covered by Medicare.
- If Extend Health is called and you are on the phone longer than 3 minutes you may get a customer service representative and not a benefits advisor; make sure you get a benefits advisor.
- Medigap plans are most like the current plan; prices will vary on Medigap plans.
- Next year (2012) open enrollment is from October to December, it is not necessary to re-enroll.
- Marcia will check to see if Wal-Mart / Walgreen's drug plans will qualify for HSA funds.
- **Any questions call Marcia Whelan at; 608-458-3680, if no answer leave message.**
- No plan changes for members under 65, premiums may go down due to increased Federal Subsidies.

**Scott Hassett** of Lawton and Cates Law Firm; gave overview of law firm and reviewed rates and services. Provided handouts of delayed compensation issues.

Break

Reconvened at 10:45 AM

**Tony Bartels** gave an overview of Union financial benefits to 965 Member and introduced Union Financials Representatives.

**Joe Fenlon** of Union Financial, gave a market update.

**Chip Buehrle** of Union Financial, reported on short bond investments with a stock mix.

- Believes market will stay volatile with the current political instability.
- Discussed work ethics in our country and investment options.

**Tony Bartels**

- Reviewed new laws on rules for municipal workers.
- Reported on Union local 965's financials.
- Reported on organizing efforts and invited retirees to assist in these efforts.
- Called for retirees to assist at Fantasy of Lights.
- Reported on Alliant Energy negotiations and settlement.
- Reported on COPE Program; \$60 donation per year puts you into a drawing sponsored by Union Financial.
- Gave "Recall Walker" update.
  - Review of Walker and legislative actions against unions.
- Update on coaled fired units on Alliant Energy's Wisconsin territory.
  - Extra expenses may result in many projects on the energy delivery side being cut.
  - Updated information on Nelson Dewey plant closing.
  - Discussed emission rules and penalties.
  - Discussed load and supply issues with Nelson Dewey shutdown.
  - Discussed new coal technology.
- Local 965 has the only union wind turbine operators in the Mid-West.

**Gene Samuelson**

- Reminded retirees of recall Walker efforts under way.
- Drawing for walking sticks donated by Dale Burkett; won by:
  - Gene Krause
  - Dave Bradley
  - Dennis Diener
  - Dale Birschbach
- Next meeting to be held in April 2012 at Union Hall in Madison.

**IV. Adjournment**

Meeting adjourned at 11:45.

Minutes submitted by: Curt Steindorf

# ***Executive Committee for Local 965 Retiree Club***

## ***Meeting Minutes***

October 17, 2011

### **I. Call to order**

**Gene Samuelson** called to order the regular meeting of the **Executive Committee Meeting** at **12:40 PM** on **October 17, 2011** in **Sam and Maddie's** in **Dodgeville, WI**.

### **II. Roll call**

Curt Steindorf conducted a roll call. The following persons were present: Pat Osborne, Tom Faull, Dale Birschbach, Gene Samuelson, Charlie Wilhelm.

### **III. New business**

- a) Charlie Wilhelm to make gavel for use at meetings.
- b) Gene Samuelson will check with AARP to see what benefits they have for the over 65 members.
- c) Gene Samuelson; looking for volunteers for the Fantasy of Lights.
- d) Gene Samuelson; looking for volunteers for "Walker Recall" efforts.
- e) April 2012 Meeting:
  - Invite Marcia Whelan for benefits discussion.
  - Invite Union Financial for updates.
  - Discuss retiree breakfasts.
  - Looking for volunteers to put together a 75<sup>th</sup> anniversary celebration for Local Union 965, on June 13, 2012; if interested call Rick Irwin, Union President.
  - Election of officers will be held at April 2012 meeting.

### **IV. Adjournment**

**Gene Samuelson** adjourned the meeting at **1:05PM**.

Minutes submitted by: Curt Steindorf