

Report of the Committee on Retired Faculty and Staff March 18, 1997

The Committee on Retired Faculty and Staff was charged by the University Committee, the Academic Staff Executive Committee, and the Provost's Office with examining current needs and resources for retirees. Specific attention was directed to ways to facilitate the transition to retirement and to retain the expertise of valued employees. The committee was further charged with presenting a report and recommendations by Spring 1997.

The full committee met three times between November and March. In addition, five subcommittee meetings addressed pre- and post-retirement issues. The following sections summarize our deliberations.

A. Guiding Principles

Our analysis has led us to the following principles as essential to the fulfillment of the charge to the committee.

1. Active employees, retirees, and their spouses or partners are valuable resources for the university and community.
2. Career development is a lifelong process of personal realization, which requires planning; retirement is one part of that process. Attention needs to be devoted to both pre-retirement and post-retirement phases of career development.
3. Early and continuous financial planning for the employee, and their spouse or partner, is important in building the foundation for successful retirement. At the same time, the psychological and social dimensions of retirement (e.g., interests, social connections) require attention to assure a healthy transition.
4. Provision of appropriate and timely career and financial information during active employment enhances the long term morale and retention of quality employees.
5. Consideration of career planning from a human resource management perspective benefits the university. Institutional and individual priorities change over time. Longer term planning enables the university to utilize critical resources.
6. In recognition for contributions over the years, the university has a continuing responsibility to retirees and those planning retirement.

B. The Current Situation at the UW-Madison

1. Between February 1, 1989 and March 1, 1997, 587 members of the faculty and 376 members of the academic staff have retired.
2. When employees announce their retirement, they are sometimes marginalized and often viewed as liabilities rather than resources.
3. Retirement and career planning is entirely the responsibility of the employee. There are sources of retirement and career planning information available for active and retired employees. Examples for active employees include the Office of Compensation and Benefits, Department of Employee Trust Funds, Tax Sheltered Annuity Vendors, Social Security Office, and the Wisconsin Alumni

Association. With the exception of the Office of Compensation and Benefits, these resources remain available for retired employees.

4. For retired employees there are additional resources that facilitate involvement in the intellectual and social life of the community. Examples include the Volunteer Professor Emeritus Program in the College of Agricultural and Life Sciences, the Wisconsin Retired Educators Association, the Division of Continuing Studies' Wisconsin Initiative for Senior Education, Participant Learning and Teaching Organization (PLATO), residential living communities, the retired faculty committee, and the University Club.
5. While the number of these services may seem substantial, significant needs remain unmet. Further, the formation of the Committee on Retired Faculty and Staff was a recognition on the part of the University Committee, the Academic Staff Executive Committee, and the University administration that unmet needs existed.
6. Nine universities among the member institutions of the Committee on Institutional Cooperation (the Big 10 plus Chicago) have active organizations of retirees. Our university does not yet have such an organization.

C. Benefits to Our University

1. Retirees and active employees are involved in many valuable activities in the university and community. For example, retirees remain an important intellectual resource for the university and community. Such involvement enhances the university's positive image.
2. Strong career and retirement planning enhances recruitment and retention.
3. Retirees provide valuable institutional memory for the university.
4. It is in the University's best interest to invest significant and effective resources in career and retirement planning to acknowledge the continued political and financial support of the individuals affected.

D. Meeting the Needs of Individuals

The university must accomplish the following goals in order to meet the needs of its employees:

1. provide lifelong career and retirement planning.
2. provide comprehensive information services and specialized counseling for career and financial planning.
3. provide and staff a center that can develop resources, educate individuals, and assist employees in utilizing existing resources.
4. support the organization of a vehicle that enables retirees to work together for their interest and for the interest of the university and the community.
5. identify and consider the nature and extent of retiree privileges (e.g., parking, office space, internet access, use of facilities).
6. actively encourage employees to develop diversity of interests and social support structures in order to facilitate the transition into retirement.

7. provide the opportunity for spouses or partners to be involved in the planning opportunities outlined above. For example spouses or partners have specific needs during times of illness, disability, and death.

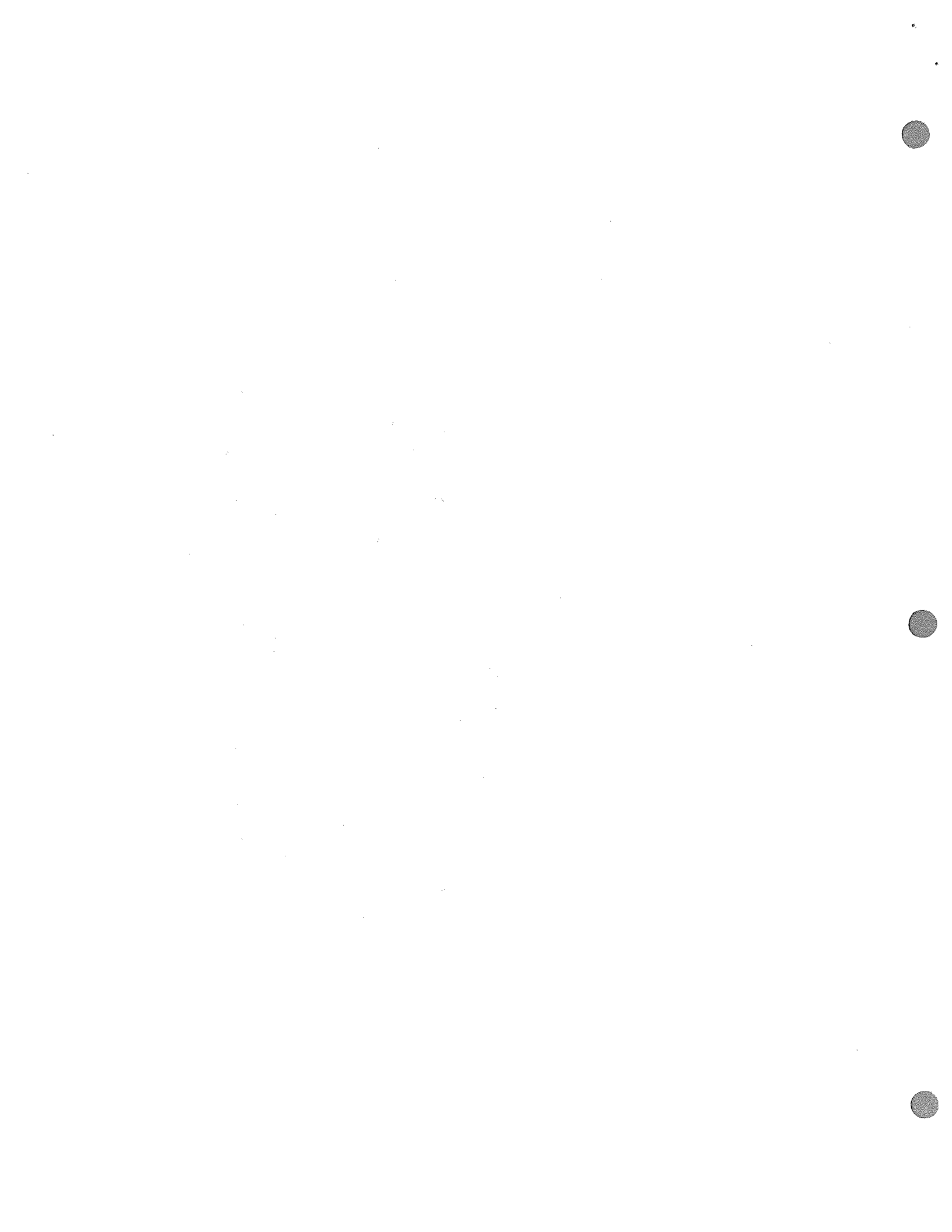
E. Recommendations

Considering the identified principles, needs, and benefits the following actions are recommended:

1. establish a standing committee to keep retirees and retirement issues connected to university governance and the institutional administration.
2. support the formation of an organization concentrating on retirement issues operated by and for its members and potentially financed in part by its members. This organization would establish links to all relevant university and community organizations (e.g., Wisconsin Alumni Association, the Wisconsin Retired Educators Association, the UW Foundation). In addition, it would provide services to and by retirees. The committee recommends that the possibility of including classified staff in this organization be pursued.
3. provide ongoing support and commitment by the institution to the principles enunciated in this report. Examples of this commitment would be (a) supporting structure(s) to coordinate and improve existing services, and (b) facilities, personnel, and support for the organization.

Committee Members

James Bower (retired faculty)	Art Hove (retired academic staff)
Max Carbon (retired faculty)	Joe Kauffman (retired faculty)
Bob Clasen (retired faculty)	Chuck Koval (retired faculty)
Joe Corry (active academic staff)	Helen Marsh (retired faculty)
Dave Cronon (retired faculty)	Phil Perrone (active faculty)
Nancy Diekelmann (active faculty)	Pat Runde (active academic staff)
Wally Douma (retired academic staff)	Steve Saffian (retired academic staff)
Jack Duffie (retired faculty)	Grace Shaw (retired academic staff)
Barney Easterday (retired faculty)	Linda Shriberg (active academic staff)
Joann Elder (retired academic staff)	George Sledge (retired faculty)
Dorie Geniesse (consultant)	Edna Mora Szymanski (active faculty)
Henry Hart (retired faculty)	Carol Tarr (retired academic staff)
Bob Heideman (retired academic staff)	Walt Trzeciak (active academic staff)
Michael Hinden (active faculty)	Dave Vinson (retired academic staff)
Tom Hoover (retired academic staff)	Jan Wheaton (active academic staff)
	Beatrice Wright (retired faculty - U of Kansas, active academic staff, UW- Madison)



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4. Provision of appropriate and timely career and financial information during active employment enhances the long-term morale and retention of quality employees.
5. Consideration of career planning from a human resource management perspective benefits the university. Institutional and individual priorities change over time. Longer term planning enables the university to utilize critical resources.
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3. Provide and staff a center that can develop resources, educate individuals, and assist employees in utilizing existing resources.

4. Support the organization of a vehicle that enables retirees to work together for their interest and for the interest of the university and the community.
5. Identify and consider the nature and extent of retiree privileges (e.g., parking, office space, Internet access, use of facilities).
6. Actively encourage employees to develop diversity of interests and social support structures in order to facilitate the transition into retirement.
7. Provide the opportunity for spouses or partners to be involved in the planning opportunities outlined above. For example, spouses or partners have specific needs during times of illness, disability, and death.

E. Recommendations

Considering the identified principles, needs, and benefits, the following actions are recommended:

1. Establish a standing committee to keep retirees and retirement issues connected to university governance and the institutional administration.
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Kansas, active academic staff, UW-Madison)*

MOTION: The Ad Hoc Committee on Retired Faculty and Staff moves the establishment of a standing committee on retirement issues, and adoption of the following FPP language. In addition to the functions detailed in the following description, the committee would be charged with implementation of the recommendations of the Ad Hoc Committee on Retired Faculty and Staff.

6.50 COMMITTEE ON RETIREMENT ISSUES

A. MEMBERSHIP - The Committee on Retirement Issues shall include the following members:

1. Five active faculty members appointed by the University Committee.
2. Five active academic staff members.
3. Five retired members of the faculty appointed by the retirees' association, or, until such is formed, the University Committee.
4. Five retired members of the academic staff appointed by the retirees' association, or, until such is formed, the Academic Staff Executive Committee.

B. FUNCTIONS

1. Review and make recommendations on services relating to retirement planning.