

**COMMITTEE ON RETIREMENT ISSUES
ANNUAL REPORTS FOR 2008-2009 AND 2009-2010**

I. Functions

The Committee on Retirement Issues was established by the Faculty Senate and Academic Staff Assembly to:

1. Review and make recommendations on university services related to retirees; and
2. Review and make recommendations on services related to retirement planning.

II. Past Year's Activities

The Committee on Retirement Issues met three times during the 2008-2009 academic year and four times during the 2009-2010 academic year to discuss issues pertaining to retirement and retirees. The committee was successful in advancing a number of concepts aimed at improving the committee's effectiveness and expanding opportunities for university retirees. A key internal committee change was the authorization by the University Committee of the appointment of an academic staff committee member as co-chair for 2009-2010. Sharing committee leadership better reflects the makeup of the committee and the division of effort among committee members. The committee intends to seek approval from the Faculty Senate to make this change permanent as soon as practicable.

The committee has also been working on increasing the number of non-faculty retirees seeking emeritus status. Seeking emeritus status for faculty retirees is routine, but many non-faculty retirees, both academic and classified staff, are unaware that this institutional recognition is open to them as well. With support from the director of the UW-Madison Office of Classified Human Resources, the committee prepared a description of the procedure for seeking emeritus status, which will be posted on the human resources web site and included in materials distributed to those seeking pre-retirement counseling. This information will allow retirees to initiate the process of seeking emeritus status before retirement like most faculty.

The committee has also developed a strong partnership with the lifelong learning unit in the Division of Continuing Studies. Lifelong learning, particularly the Osher Lifelong Learning Institute, has many programs that would be of keen interest to retirees. In turn, our committee can assist lifelong learning to reach retirees, particularly new ones. Discussions continue about sharing web resources and other methods of reaching our shared audience.

III. Current Issues or Concerns

A continuing goal for the committee is the attainment of campus space to establish a retiree's center. There exists a wealth of resources available to retirees, but these resources are not well known or easily accessed. The committee continues to seek both a physical location for a retirement center and a web presence to communicate with retirees.

A continuing committee concern is also the elimination of non-UW-Madison retirees from university web directories upon retirement. For example, UW-Extension staff are included in this directory during their careers but are removed after retirement, even if they have obtained emeritus status. This creates confusion for those seeking to contact these people. The committee would like to assist with resolving this issue so that all emeritus retirees can continue to be web listed.

IV. Future Issues

The committee intends to continue to expand its relationship with lifelong learning and the UW-Madison Retirement Association in the area of increasing retiree volunteerism. Many opportunities exist to increase retiree involvement in service learning and other venues, to tap the considerable skills of our retirees for the public good. Additionally, the committee intends to look at options for university faculty and staff to phase into retirement, rather than be forced to retire outright. Other universities have phased retirement programs, which will be investigated. Phased retirement could give our university faculty and staff more options to continue to be productive university employees while giving something back to their departments or units.

V. Summary/Recommendations

The committee has three recommendations. First, establish a web site to provide retirement resources to the university community. Second, provide space on campus to house a retirement center to serve retirees as a place to meet, share and learn. Third, provide continuing web directory listings for non-UW-Madison emeritus retirees. These recommendations would go a long way toward increasing the number of active retirees who will continue to stay linked to the university.

VI. Committee Membership

2008-2009	2009-2010
Doreen Adamany	Doreen Adamany
Mark Albanese	Darrell Barth
Darrell Barth	Joan Calkins
Jon Goldstein	Jon Goldstein
Susan Heidrich	Susan Heidrich
Roger Howard	Jane Hutchison
Jane Hutchison	Joan Irwin, co-chair
Joan Irwin	Don Klimpel
Gary Johnson	Patricia Lasky
Don Klimpel	Susan Nitzke
Patricia Lasky	Stephen Pearson
Steve Myrah	Charles Stathas
Susan Nitzke	William Steffenhagen
Stephen Pearson	Millard Susman
Millard Susman	Charlene Tortorice
Charlene Tortorice	Ann Wallace
Ann Wallace	Patrick Walsh, co-chair
Patrick Walsh, chair	Donald Wiebe
Patricia Wolleat	Patricia Wolleat
Douglas Worsham	Douglas Worsham