

**RETIREMENT ISSUES COMMITTEE
ANNUAL REPORT FOR 2011-2012**

I. Functions

This committee was established by the Faculty Senate and Academic Staff Assembly to:

- review and make recommendations on university services relating to retirees; and
- review and make recommendations on services relating to retirement planning.

II. Past Year's Activities

The Retirement Issues Committee (RIC) met four times during the 2011-2012 academic year. RIC was successful in meeting its goals, in improving the committee's effectiveness, and in expanding opportunities for university retirees.

The RIC web page committee continued its work from last year. Joyce Tikalsky currently serves as the webmaster and has migrated (and expanded) our content onto a Google Apps-created page. The Google Apps web tool is more suited to our needs than the previous CMS tool as it is much easier to learn and use. Thus, any committee member, now and in the future, can add content to the page with minimal instruction. Joyce reserved the name retirement.wisc.edu for our page. The page has not yet gone public as we are still adding content. We want it to be largely finished before its debut so that employees will immediately find it useful and therefore, continue to visit. The primary focus of the page, as determined last year, is pre-planning for retirement.

We continued to discuss potential future space for retirees on campus. Dean Jeff Russell, from the Division of Continuing Studies, graciously offered two small offices at 21 N. Park Street for this purpose as a one- to two-year trial. If the trial is successful, the space could become a permanent home. Some on the committee believe the space would be more heavily utilized if the University of Wisconsin Retirement Association moves its office to the space as well, but at this time, UWRA is committed to staying in the UW Foundation building. A subcommittee is currently discussing a proposal for the space.

We met with Carla Raatz to discuss general questions about the new HRS and specifically, how retirees are listed in the directory (this has been an issue in the past). On the new system, emeriti faculty and staff are listed (along with their associated departments), as are other Madison-area UW retirees who are not from UW-Madison (i.e., UW System, UW-Extension, and UW Colleges). Some non-emeriti retirees are also listed, primarily those who have requested that they continue to receive communications from the university. However, the names of these non-emeriti retirees are not added or controlled centrally.

We also discussed retired annuitant issues with Carla Raatz, as this has taken on major significance this year. She suggested we continue the discussion with Steve Lund, the authority on such issues on the Madison campus. Steve will be joining us for our meeting in late April.

Richard Straub and Patricia Iaccarino have agreed to continue as co-chairs for 2012-2013 if no one else expresses interest.

III. Summary/Recommendations

The committee has three recommendations for the upcoming academic year. First, we would like to move the retirement web page from draft stage to an actual, public web page. Second, depending on the recommendations of the subcommittee working on the retiree space proposals, we would like to move forward in setting up this space. Third, we would like to continue to address the concerns of soon-to-be and current retirees and serve as a voice for them with appropriate personnel in light of changing state and campus policies (e.g., policies re: retired annuitants).

IV. Committee Membership

Darrell Barth	Kathleen Poi
Sandra Bertics	Cyrena Pondrom
Joan Calkins	Jeffrey Russell
David Combs	William Steffenhagen
Judith Craig	Richard Straub, co-chair
Robert Dye	Millard Susman
Patricia Iaccarino, co-chair	Joyce Tikalsky
Nancy Kunde	Charlene Tortorice
Steven Limbach	Ann Wallace
Stephen Pearson	Donald Wiebe