

Retiree Rights and Benefits Committee Year-End Report to the KU  
University Senate  
(17 April 2013)

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Respectfully submitted,



John G. Younger  
Professor of Classics  
Chair, RRB Committee, 2012-2013

## Report, 2012-2013

### 1. Summary

The main charge to the RRB Committee was to try and resolve the ill will felt by retirees at the loss of privileges in 2009. The RRB Committee feels that this ill will resulted primarily from retirees receiving little detailed information about why these privileges were being rescinded in the first place and from poor communication between the University and retirees thereafter.

The following document details the steps taken by the RRB Committee to obtain that detailed information, organize it, and then to disseminate that information back to the retirees in the hopes that having proper and detailed information will help dispel their ill will.

We believe that frequent communication between the University and retirees will obviate future ill will.

I want to thank the members of the RRB Committee and the Provost's Office for working diligently on this problem.

### 2. Introduction and Schedule of Meetings

As is well known, retirees have been profoundly unhappy at the loss of privileges under Provosts Schulenberger and Lariviere. Last year's report by Jim Lichtenberg detailed these losses: free tickets to Lied Center events, free athletic tickets, and free parking.

On September 18, 2012, RRB Committee Chair Younger met with the co-Presidents of the Endacott Society to lay out his agenda for the CRRB: to meet with the Endacott Society and get a more detailed sense of the concerns of retirees; then to meet with the Provost and offer his assistance in resolving the main issues of concern; and to meet with the members of CRRB to get their input in this process.

On November 7, Younger met with the Endacott Society to get a sense of their frustration (see **Appendix A1**). There were about 100 members in attendance. Many testified to their unhappiness with their losses of privilege and about 12 had changed their wills to dis-include KU as a beneficiary. Some solutions were discussed, including using KU Retiree Cards to obtain Lied Center tickets and parking.

On December 3, the entire RRB Committee met to discuss Younger's agenda (see **Appendix A2**). Again, there was much frustration with the lack of progress and little confidence that Younger would succeed in alleviating that frustration.

On January 29, 2013, Younger met with the Provost to outline a possible solution for dealing with the frustration of the retirees (see **Appendix A3**), namely to have the Provost suggest that the Directors concerned (Lied Center, Parking, Athletics) and Younger work on reinstating some of the privileges lost. The Provost was grateful that the RRB Committee was willing to work toward a solution.

On January 31, Ola Faucher emailed Younger her responses (see **Appendix C**) to his enquiry regarding the University Senate's charge to maintain an updated retiree-contact list and an exit survey. An updated retiree contact list is maintained and an exit survey is provided to retirees to fill out, although many do not. Departments are encouraged to have their retirees fill out the survey but there is little incentive to do so. This could be an agenda item for next year, once the present frustrations are resolved.

On March 6, Younger met with Linda Luckey from the Provost's office to begin setting up further meetings to help find solutions for dealing with the frustration of the retirees.

On April 10, Younger met again with Luckey and with Jeannette Johnson and Mary Lee Hummert. They provided new information in detail.

On April 16, the second meeting of the RRB Committee. Younger presented a summary of the reasons why Provost Lariviere had rescinded various privileges (see **Section 3, below**) and made recommendations for the future work of the RRB Committee. The Committee accepted this summary. Discussion then focused on six recommendations to the University Senate for further work of the RRB Committee (see **Appendix D**) — these also were accepted. Younger then commended the Committee for its significant work in 2012-2013 and adjourned the Committee.

On May 15, Younger is scheduled for a second meeting with the Endacott Society, at which he will present a summary of the work of the RRB Committee and its recommendations.

### 3. Loss of Retiree Privileges, a detailed outline

**Note: in the following calculations of benefit costs, it is presumed that the ca. 450 Endacott members imply 600 retirees living in the vicinity of KU. The Provost's Office keeps a list of retired faculty and unclassified staff and their surviving spouses (University Support Staff [USS] retirees are not included); at present there are 950 on that list with 90 more being added in May, 2013.**

The 1963-1996 Faculty Handbooks listed retiree benefits: access to campus, free parking on campus, some free Lied Center tickets, discounts to athletic events, and University Theater tickets.

Since 2010, The Handbook for Faculty and Other Unclassified Staff has been available electronically as a PDF in the KU Policy Library.<sup>1</sup> It does not address matters related to retired faculty and unclassified staff; instead, a document called "Information for Retirees and Prospective Retirees" now also resides in the KU Policy Library,<sup>2</sup> where it is updated annually by HR and the University Senate Committee on Retiree Rights and Benefits (last update May 2012).

Before 2007, the Lied Center and the Kansas Athletics Inc. (KAI) were issuing free and discounted tickets (respectively) to KU retirees.

From 2007-2009, the University was reimbursing the Lied Center and KAI for free tickets to the Lied and for discounted tickets to athletic events, for faculty, staff, and retirees.

From 2007-2009, two years, the University reimbursed the Lied Center for retiree tickets \$29,000.

Because of recent cuts in the Kansas Arts Commission, the Lied Center has incurred another \$29,000 loss in revenues.

In 2007-2008, the University reimbursed KAI for the faculty-staff discount of 20% for tickets to basketball, football, and other athletic events.

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<sup>1</sup> <https://documents.ku.edu/policies/provost/FacultyandUnclassifiedStaffHandbook.pdf>

<sup>2</sup> [https://documents.ku.edu/policies/Human\\_Resources/Retirees\\_Handbook.pdf](https://documents.ku.edu/policies/Human_Resources/Retirees_Handbook.pdf)

The total cost in 2007-2008 to the University for reimbursements of Lied Center and Athletics tickets was \$451,000 (the equivalent of the salaries of about 11 employees) -- this cost includes the \$29,000 that the University reimbursed the Lied Center. The bulk of the reimbursements was for tickets to Athletic events.<sup>3</sup> Provost Lariviere ended that reimbursement on April 1, 2009, as being too expensive to the University, but he said at the time that KU hopes to restore the discounts as "soon as the budget situation improves."

On April 1, 2009, Provost Lariviere emailed the entire faculty and staff, announcing that he was withdrawing three privileges (see **Appendix A**): free parking on campus, free Lied Center tickets, and discount tickets to athletic events.<sup>4</sup>

Another factor: The KS Government Ethics Commission ruled that, if any discount is offered to KU employees, this discount must be offered to all state employees.

### Unrescinded privileges

- "Access to campus" may mean access to University services like the Libraries, research support, recreation facilities, etc. These are listed in the "Information for Retirees and Prospective Retirees."<sup>5</sup>
- University Theater still offers 2 complimentary tickets for each production held in the Crafton-Preyer Theatre (Main Stage series). The Theatre gets no support from the University to offset the costs of these free tickets.

### Rescinded privileges

- Free Parking on Campus
  - KU Parking & Transit is an "auxiliary enterprise": it gets no University funding for its operation and must therefore support itself through fees. Any free parking permit would have to be offset by raising the fees for students, faculty, and staff.
  - Since 2004-5, retirees have not had free parking on campus.
  - As stated on the Parking and Transit website, "Retirees ... may purchase a retiree permit for \$75, or obtain a Park & Ride permit for free."<sup>6</sup>
  - The \$75 retiree parking permit is the lowest priced annual parking permit of any group, including students. The permit includes access to the main campus and, for an extra \$5.00, parking in the Union garage (off Mississippi St). From FY 2010 through FY 2013, some 275 retirees (263-293) have purchased an annual parking permit.
  - For Park & Ride, the pass is free. The Park & Ride lot is located off Constant Avenue at the west end of 21st St. The 41 bus runs every 6 minutes between the Park & Ride lot and

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<sup>3</sup> The actual breakdown (which sports, how many purchasers were retirees, etc.) is not known. For comparison, in 2011, 540 employees and retirees (including KUMC) purchased a total of 1100 season tickets for basketball. Retirees represented 122 of the 540, or ca 23%. The cost of a pair of season tickets was \$2350 (handling fees included). The total value of the 1100 basketball tickets was \$1,292,500; a 20% discount for those tickets would have cost the University \$258,500. For another comparison, in 2012, 50+ employees/retirees purchased 102 football season tickets. The most economical season ticket was \$199; if all 102 tickets were at this price, the total cost would have been \$20,298; a 20% ticket discount would have cost the University \$4,059.60.

<sup>4</sup> For further details, see <http://www2.kusports.com/news/2009/apr/01/ku-ends-athletic-ticket-discounts-faculty-and-staf/>.

<sup>5</sup> [https://documents.ku.edu/policies/Human\\_Resources/Retirees\\_Handbook.pdf](https://documents.ku.edu/policies/Human_Resources/Retirees_Handbook.pdf)

<sup>6</sup> <http://parking.ku.edu/facstaff.shtml>

Bailey Hall. Riders wanting to go to the Union/Adams Alumni Center should get off at Bailey, walk across the street, and take any bus going east.

- **Free Lied Center Tickets**  
The Lied Center seats ca. 2000 people; it offers a 10% senior discount, which is available to retirees. Friends of the Lied may get larger discounts, up to 20%. From 2007-2009, two years, the University reimbursed the Lied Center for retiree tickets \$29,000. Today, the Lied Center gets no support from the University to offset the costs of such a benefit.
- **Discount Tickets to Athletic Events**  
Before 2007, KAI provided discounted tickets for faculty, staff, and retirees. From 2007-2009, the University reimbursed KU Athletics for the faculty-staff discount of 20%. Provost Lariviere ended that reimbursement on April 1, 2009, as being too expensive to the University.  
Since 2009, therefore, no discounted tickets have been available to KU faculty, staff, and retirees.

#### **4. Recommendations to the University Senate: future work of the RRB Committee**

1. Can the privileges that now exist for retirees (free Park & Ride, parking permits) be extended to the spouses of deceased retirees?

Jeannette Johnson reported that Donna Hultine, Director of Parking and Transit, is receptive to the possibility of allowing the widows and widowers of employee & USS retirees to purchase retiree parking permits. She will need to explore whether there is any policy or legal reason for not doing so, and whether such a change would require action by the Parking Commission. She would also need a list of eligible individuals (the number is expected to be approximately 12). Jeannette Johnson said she would continue to explore this opportunity.

2. Could it be written into the University Senate's charges to its Committee on Retiree Rights and Benefits that the Chair of the Committee visit the Endacott Society (being the only organized body of KU employees) at least once a semester in order to facilitate open and clear communication between the retirees of the Endacott Society and the University Senate?
3. Could it be recommended that the Provost's Office also send a representative to visit the Endacott Society regularly in order to facilitate open and clear communication between the retirees of the Endacott Society and the University?
4. Could there be an official KU website for depositing "information for retirees"? Links to "The Handbook for Faculty and Other Unclassified Staff," "Information for Retirees and Prospective Retirees," to the Endacott Society's homepage, and to the Chair of the RRB Committee, could all be made available there, as well as FAQs about retirement. Retirees often receive mis- and conflicting information, since the situation for retirees of various units differs dramatically, unit-by-unit.

5. While the RRB Committee is already charged with keeping up-to-date a list of retirees, it may be beneficial to have the list prepared by HR for the Alumni Association sent automatically also to the Endacott Society; at present, the Presidents of the Endacott Society have to request that list annually.
6. While it is recognized that spouses of deceased retirees are not eligible for KU email addresses, could they be entered into the KU Alert System (<http://www.alerts.ku.edu/>)? Such would be beneficial for the children and family of the deceased retirees.

## Appendices

### Appendix A. Minutes of Meetings (7 Nov 2012, 3 Dec 2012, 29 Jan 2013)

#### 1. 7 Nov 2012

Retirees

Meeting: JGY & Endacott Society

Wednesday, November 7, 2012

Faculty Handbook:

<https://documents.ku.edu/policies/provost/FacultyandUnclassifiedStaffHandbook.pdf>

Information for Retirees:

<https://documents.ku.edu/policies/Human Resources/Retirees Handbook.pdf>

Basketball tix:

<https://documents.ku.edu/policies/governance/FacultyStaffRetireesMensBasketballPolicy.htm>

"KU benefits-eligible faculty, staff (Permanent employee 50% or more) and retirees are eligible to purchase up to two tickets each."

FY 13 charge to the committee:

1. Promote all appropriate means of communication with retirees, with special emphasis on seeking information from them about their needs and concerns.  
**Committee chair/designate meet with Endacott once/semester**
2. Consult the Department of Human Resources/Equal Opportunity and the Office of the Provost on the maintenance of an up-to-date contact list for retirees. (ongoing)
3. Consult with SenEx about views and concerns related to retirees.
4. Seek feedback from retirees and University offices about the *Retirees Handbook* and work with staff to ensure that it remains current. (ongoing)  
**encourage Endacott members submit updates to John & Linda Mullens**

Specific charges:

1. Work directly with staff from HR/EO to expand that office's "Exit Survey" to include questions specifically related to retirees' concerns. Report recommendations or actions to SenEx by 02/1/13.
2. Identify recently suspended retiree benefits: **Lied & Athletic tickets, parking**
3. Prepare presentation to University Senate on these recent changes, with the goal of guiding University Senate action on these matters.

Report of May 8, 2012:

rehearsed the recent history of "suspended" retiree benefits.

- (a) Lied Center tickets

(b) parking privileges

(c) athletic tickets

presumably to save KU money (Provost's Office indicated some \$490,000)  
updated retiree handbook uses the word "suspend" (not "end" or "terminate") — such language suggests that these benefits will, at some point, be reinstated.

## **2. 3 Dec 2012**

### **Senate Retirees Benefits and Rights Committee**

Minutes

December 3, 2:00-3:30 pm, in the Conference Room of the Public Safety Office of KU

Present: Robert Brown, Ann Eversole, Grant Goodman, Robert Harrington, Ruthie Hatfield,  
Mary Lee Hummert, Bev Mater, John Mullens, Linda Mullens, Liz Phillips, John Younger

#### Charge to the Committee

1. "Promote all appropriate means of communication with retirees, with special emphasis on seeking information from them about their needs and concerns." The chair of the RBRC should meet with Endacott once/semester.
2. "Consult the Department of Human Resources/Equal Opportunity and the Office of the Provost on the maintenance of an up-to-date contact list for retirees." (ongoing)
3. "Consult with SenEx about views and concerns related to retirees."
4. "Seek feedback from retirees and University offices about the *Retirees Handbook* and work with staff to ensure that it remains current." The chair of the RBRC encourages Endacott members submit updates to John & Linda Mullens.

#### Specific charges:

1. "Work directly with staff from HR/EO to expand that office's 'Exit Survey' to include questions specifically related to retirees' concerns. Report recommendations or actions to SenEx by 02/1/13."
2. "Identify recently suspended retiree benefits": Lied & Athletic tickets, parking
3. "Prepare presentation to University Senate on these recent changes, with the goal of guiding University Senate action on these matters."

#### Reports

##### Report of the Senate RBR Committee, 8 May 2012

rehearsed the recent history of "suspended" retiree benefits.

(a) Lied Center tickets — was 2 tickets; Budig changed it to 1 ticket

(b) also University Theater, 1 ticket

(c) parking privileges — bus system is free with retirees card, but it only goes to Bailey  
handicapped parking is frequently not available

(d) athletic tickets

presumably to save KU money (Provost's Office indicated some \$490,000)

updated retiree handbook uses the word "suspend" (not "end" or "terminate") — such language suggests that these benefits will, at some point, be reinstated.

JY met with the Endacott Society (7 Nov, 10:30-11:00 am)

discussed privileges revoked and responses

announced his intention to meet with the Provost

meeting scheduled with the Provost, 29 Jan, 3:00-3:30

#### Contact information

Chair: John Younger, Women, Gender & Sexuality Stds, (2013) [jyounger@ku.edu](mailto:jyounger@ku.edu)



James Lichtenberg, Education Administration, (2013) [jlicht@ku.edu](mailto:jlicht@ku.edu)  
 Robert Harrington, Psych & Research in Education, (2015), [rgharrin@ku.edu](mailto:rgharrin@ku.edu)  
 Robert Brown, Emeritus, Mathematics, **Retired Faculty** (2013) [rbrown@ku.edu](mailto:rbrown@ku.edu)  
 Liz Phillips, Public Safety Office, Unclassified staff (2015) [lphillips@ku.edu](mailto:lphillips@ku.edu)  
 Ann Eversole, **Retired Unclassified staff** (2015) [aeversole@ku.edu](mailto:aeversole@ku.edu) — to be replaced by Jeannette Johnson  
 <jjohnson@ku.edu>, Spring 2013  
 Ruthie Hatfield, [ruthie@ku.edu](mailto:ruthie@ku.edu), Psych/Rsch in Education, University Support Staff, (2013), [ruthie@ku.edu](mailto:ruthie@ku.edu)  
 Bev Mater, **Retired University Support Staff**, [bevmater@gmail.com](mailto:bevmater@gmail.com) (2013)

John Mullens, [jmullens@ku.edu](mailto:jmullens@ku.edu), Co-President, Endacott Society  
 Linda Mullens, [lmullens@ku.edu](mailto:lmullens@ku.edu), Co-President, Endacott Society  
 Grant Goodman, [plim@ku.edu](mailto:plim@ku.edu), Designee, Endacott Society

Ex officio, non-voting: Mary Lee Hummert, Vice Provost, [mlhummert@ku.edu](mailto:mlhummert@ku.edu)

### **New Business: next committee meetings in Public Safety, 2-3:30 pm: 26 February, 2-3:30 pm in Public Safety**

### **3. Jan 13, 2013**

#### **University Senate's charge to the Retirees Benefits & Rights Committee:**

1. Promote all appropriate means of communication with retirees, with special emphasis on seeking information from them about their needs and concerns.  
**Committee chair/designate meet with Endacott once/semester**
2. Consult the Department of Human Resources/Equal Opportunity and the Office of the Provost on the maintenance of an up-to-date contact list for retirees. (ongoing)
3. Consult with SenEx about views and concerns related to retirees.
4. Seek feedback from retirees and University offices about the *Retirees Handbook* and work with staff to ensure that it remains current. (ongoing)  
**encourage Endacott members submit updates to John & Linda Mullens**

#### Specific charges:

1. Work directly with staff from HR/EO to expand that office's "Exit Survey" to include questions specifically related to retirees' concerns. Report recommendations or actions to SenEx by 02/1/13.
2. Identify recently suspended retiree benefits: Lied & athletic tickets, parking
3. Prepare presentation to University Senate on these recent changes, with the goal of guiding University Senate action on these matters.

#### **Retirees already figure in the MiniCollege series.**

#### **Can the Retirees figure in KU's "New Cities" project?**

#### **What else can retirees do for KU?**

#### **History**

June 29, 2011: meeting Sandra Weichert, President of the Endacott Society, and Provost Vitter history of the Society

400 members meeting every Wed, 10-12, in the Adams Alumni Center

faculty handbooks (1963-1996) promised retiree benefits: access to campus, free parking, some free Lied Center tickets, discounts to athletic events, and University Theater tickets

"The amount of ill will created by the without-warning losses is huge."

These are our requests:

The return of access to the KU campus through free or at least discounted parking passes; free Lied Center tickets for perhaps some events; a new look at athletic discounts.

May 8, 2012: Report of the RBR Committee to University Senate rehearsed the recent history of “suspended” retiree benefits.

- (a) Lied Center tickets
- (b) parking privileges
- (c) athletic tickets

presumably to save KU money (Provost's Office indicated some \$490,000)

updated retiree handbook uses the word “suspend” (not “end” or “terminate”) — such language suggests that these benefits will, at some point, be reinstated.

November 7, 2012: JY addresses the Endacott Society unhappiness expressed at the loss of privileges amended wills

would like privileges reinstated

**tickets (Lied: tickets were set aside), athletic discounts; parking**

plus: privileges extended to widows/widowers, and email, bus service (from off campus parking to Bailey, not the Union/Alumni Center)

February 1, 2013: due date for a report from the RBR Committee to the University Senate on progress:

February 26, 2013: next meeting of the RBR Committee

#### RBR Committee contact information

Chair: John Younger, Director of Jewish Studies, (2013) [jyounger@ku.edu](mailto:jyounger@ku.edu)

James Lichtenberg, Education Administration, (2013) [jlicht@ku.edu](mailto:jlicht@ku.edu)

Robert Harrington, Psych & Research in Education, (2015), [rgharrin@ku.edu](mailto:rgharrin@ku.edu)

Robert Brown, Emeritus, Mathematics, **Retired Faculty** (2013) [rbrown@ku.edu](mailto:rbrown@ku.edu)

Liz Phillips, Public Safety Office, Unclassified staff (2015) [lphillips@ku.edu](mailto:lphillips@ku.edu)

Jeannette Johnson, **Retired Unclassified staff** (2015) [jjohnson@ku.edu](mailto:jjohnson@ku.edu) — replaced Ann Eversole

Ruthie Hatfield, [ruthie@ku.edu](mailto:ruthie@ku.edu), Psych/Rsch in Education, University Support Staff, (2013),

[ruthie@ku.edu](mailto:ruthie@ku.edu)

Bev Mater, **Retired University Support Staff**, [bevmater@gmail.com](mailto:bevmater@gmail.com) (2013)

John Mullens, [jmullens@ku.edu](mailto:jmullens@ku.edu), Co-President, Endacott Society

Linda Mullens, [lmullens@ku.edu](mailto:lmullens@ku.edu), Co-President, Endacott Society

Grant Goodman, [plim@ku.edu](mailto:plim@ku.edu), Designee, Endacott Society

Ex officio, non-voting: Mary Lee Hummert, Vice Provost, [mlhummert@ku.edu](mailto:mlhummert@ku.edu)

## Appendix B

### B. Agenda for the Meeting on 16 Apr 2013 the results of this meeting is the present report

#### Senate Retirees Benefits and Rights Committee

##### Agenda

April 16, 2:00-3:30 pm, in the Conference Room of the Public Safety Office of KU

Meeting scheduled for February 26 was cancelled due to lack of progress and bad weather.

JY report on his meeting with the Provost, 29 Jan, 3:00-3:30

JY met with the Endacott Society (7 Nov, 10:30-11:00 am)

discussed privileges revoked and responses

announced his intention to meet with the Provost

unhappiness among retirees at loss of former privileges (parking, Lied & athletic tickets, University Theatre)

rehearsed the recent history of “suspended” retiree benefits.

(a) Lied Center tickets

(b) parking privileges

(c) athletic tickets

presumably to save KU money (Provost's Office indicated some \$490,000)

updated retiree handbook uses the word “suspend” (not “end” or “terminate”) — such language suggests that these benefits will, at some point, be reinstated.

**email for widows/widowers; other privileges**

#### Charge to the Committee

1. Promote all appropriate means of communication with retirees, with special emphasis on seeking information from them about their needs and concerns.

#### Specific charges:

2. Identify recently suspended retiree benefits: **Lied & Athletic tickets, parking**

#### Contact information

Chair: John Younger, Women, Gender & Sexuality Stds, (2013) [jyounger@ku.edu](mailto:jyounger@ku.edu)

James Lichtenberg, Education Administration, (2013) [jlicht@ku.edu](mailto:jlicht@ku.edu)

Robert Harrington, Psych & Research in Education, (2015), [rgarrin@ku.edu](mailto:rgarrin@ku.edu)

Robert Brown, Emeritus, Mathematics, **Retired Faculty** (2013) [rbrown@ku.edu](mailto:rbrown@ku.edu)

Liz Phillips, Public Safety Office, Unclassified staff (2015) [lphillips@ku.edu](mailto:lphillips@ku.edu)

Jeannette Johnson, **Retired Unclassified staff** (2015) [jjohnson@ku.edu](mailto:jjohnson@ku.edu) — replaced Ann Eversole

Ruthie Hatfield, [ruthie@ku.edu](mailto:ruthie@ku.edu), Psych/Rsch in Education, University Support Staff, (2013), [ruthie@ku.edu](mailto:ruthie@ku.edu)

Bev Mater, **Retired University Support Staff**, [bevmater@gmail.com](mailto:bevmater@gmail.com) (2013)

John Mullens, [jmullens@ku.edu](mailto:jmullens@ku.edu), Co-President, Endacott Society

Linda Mullens, [lmullens@ku.edu](mailto:lmullens@ku.edu), Co-President, Endacott Society

Grant Goodman, [plim@ku.edu](mailto:plim@ku.edu), Designee, Endacott Society

Ex officio, non-voting: Mary Lee Hummert, Vice Provost, [mlhummert@ku.edu](mailto:mlhummert@ku.edu)

**New Business: next committee meeting, Fall Semester, 2-3:30 pm, Public Safety**

## Appendix C

### C. Ola Faucher re: Contact List for Retirees & an Exit Survey

Sent: Thursday, January 31, 2013, 3:00 PM

John, I apologize for my slow response. My answers to your questions are noted below. Mary Lee may have something she wishes to add. I hope these help. Ola

1. To "Consult the Department of Human Resources and the Office of the Provost on the maintenance of an up-to-date contact list for retirees."

When a faculty or staff member retires we change their appointment information in the HR/Pay system to an "affiliate" (unpaid) status of retiree. I can't historically guarantee that all retirees' data was accurately captured in this fashion, but it would be at least a starting place. We had to run a "query" against the database in an ad hoc reporting capacity to provide such a list.

Historically the Provost Office maintained a "courtesy benefits" list of unclassified retirees and their widows/widowers. Mary Lee would have to tell you if that list is still maintained.

2. "Work directly with staff from HR to expand that office's 'Exit Survey' to include questions specifically related to retirees' concerns.

Here's the exit questionnaire you can find on our HR website. It's available to anyone who wants to complete/submit it. We usually depend upon departments to notify departing employees of its availability. We have a very, very low response rate, but we haven't really invested a recent effort in improving the process. As you can tell from looking at the exit questionnaire, it has nothing to do with retiree concerns. If that project is of interest, we're always willing to work with campus groups as our resources allow.

<http://www2.ku.edu/~hreo/cgi-bin/exit/index.php>

-----Original Message-----

From: Younger, John G  
Sent: Thursday, January 31, 2013 12:21 PM  
To: Faucher, Ola; Hummert, Mary Lee  
Cc: Corbett, Kevin J  
Subject: Re: Faculty Senate Committee on Retirees

Ola & Mary Lee,

I sent the following early last month, regarding information about exit surveys of retired faculty & staff and the maintenance of an up-dated-contact information.

Perhaps the request sailed into cyberspace.

Since I'm supposed to report to the Faculty Senate, Executive Committee, tomorrow on these two issues it'd be good if I had something to report ;)

JohnY

~~~~~  
John G. Younger  
Professor of Classics  
Associate Director, CGIS, for Jewish Studies  
CLSX: 1445 Jayhawk Blvd, 1032 Wescoe  
T: 785-864-3263; F: 785-864-5566  
JWSH: 1445 Jayhawk Blvd, 4029 Wescoe  
T: 785-864-6446  
The University of Kansas  
Lawrence, KS 66045 USA  
E: [jyounger@ku.edu](mailto:jyounger@ku.edu)  
W: <http://people.ku.edu/~jyounger>  
cell phone in Greece: (011 30) 69 39 54 56 76

On 1/10/13 1:12 PM, "Younger, John G" <[jyounger@ku.edu](mailto:jyounger@ku.edu)> wrote:

Ola, Mary Lee,

As chair of the Faculty Senate Committee on Retirees Benefits and Rights (RBRC), I have been given 2 charges:

1. To "Consult the Department of Human Resources/Equal Opportunity and the Office of the Provost on the maintenance of an up-to-date contact list for retirees."

And I'm supposed to report to the Senate Executive Committee by 1 February -- I'm sure that could be stretched a bit (I'd hate to rush you).

So, my question: is there a mechanism for determining an up-to-date contact list for retirees?

2. "Work directly with staff from HR/EO to expand that office's 'Exit Survey' to include questions specifically related to retirees' concerns.

I don't quite understand this last charge: is there an exit survey?, is it

administered to every employee and faculty who leave or retire from KU?  
does it have questions "specifically related to retirees' concerns"??

If so, perhaps I could have a copy of this to present to the RBRC at our  
next meeting.

Since the KU Alumni Association might also have answers to these  
questions, I copy Kevin Corbett who could possibly forward this to someone  
there who could help.

Many thanks!

JohnY

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## Appendix D

### Provost Lariviere's Email to Faculty & Staff, April 1, 2009

Hummert, Mary Lee

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**From:** owner-KULSFA-L@iistproc.cc.ku.edu on behalf of Provost, University of Kansas [provadmin@ku.edu]  
**Sent:** Wednesday, April 01, 2009 11:32 AM  
**To:** kulsfa-l - KU Lawrence Staff, Faculty and Affiliates  
**Subject:** FYI Ticket Discounts Suspended

Dear Colleagues,

As KU implements the budget reductions that stem from the economic crisis, our priority has been to maintain the core academic and research functions of the university. This focus enables us to continue to fulfill the mission given to us by the people of Kansas, but still requires cuts that affect the faculty and staff of the university.

Today I want to tell you of another of these cuts.

To show appreciation for the work of KU's faculty and staff members, and to encourage participation in university events, the university has subsidized discounted faculty/staff tickets to KU sporting events and Lied Center events, as well providing a number of free Lied Center tickets to KU retirees.

These subsidies cost KU \$451,000 this year – the equivalent of 11 or more employee salaries.

We cannot in good conscience lay off additional employees in order to maintain this discount. As a result, KU will be temporarily suspending the faculty/staff discount for athletic and Lied Center tickets for 2009-10. The only exception to this suspension will be the discount for 2009 football season tickets because those tickets have already been purchased. Also suspended will be the free tickets that retirees can receive for up to three Lied Center series.

I know this will impact the wallets of a number of dedicated KU faculty, staff and retirees during a time of economic hardship. However by spreading this cost out amongst ticket holders, we can devote the savings to the academic and research functions of KU and protect the jobs of several additional employees.

It is our goal to restore these discounts as soon as the budget situation improves. I appreciate your understanding and welcome your feedback.

Sincerely,

Richard W. Lariviere

Provost and Executive Vice Chancellor

## Appendix E

### Retiree Rights and Benefits Committee Year-End Report to the KU University Senate 2011-2012

An initial meeting of the committee was convened in early fall by the committee chair, Prof. Reva Friedman. Plans were established to resume work on revising the KU Retiree Handbook (*INFORMATION FOR RETIREES AND PROSPECTIVE RETIREES*). The chair was to arrange for further meetings, but none were called. In late spring (2012), after numerous attempts by the Governance Office to contact the chair to schedule meetings for continuing the committee's work, the previous chair of the committee (J. Lichtenberg) was contacted by the Governance Office. As acting chair, Lichtenberg pulled together KU policy statements from the Provost's Policy Library that relate to staff and faculty retirees. He also contacted J. Johnson in the Provost's Office and found that over the previous spring and summer, the handbook had been reviewed and given some corrective up-dates by the Provost's Office and by HR. The revised draft of the handbook was provided to committee members, reviewed, and further edited, with those revisions sent to the Provost's Office for final review and posting in the Policy Library.

The committee reviewed the recent history of "suspended" retiree benefits. These include: (a) Lied Center tickets, (b) parking privileges, and (c) athletic tickets. Different members of the committee (and so, we would expect, members of the KU retiree community) have different understandings of the reasons or motives behind the suspension of these benefits/privileges. The common thread in those understandings was cost savings to the university. The text provided by the Provost's Office in its proposed revision of the retiree handbook (*Information for retirees and prospective retirees*) contains the statement that "the university suspended the subsidy that had paid for complementary (Lied Center) tickets for retirees." The committee would respectfully request that the University Senate secure an accounting of how much has been saved by this and other benefit reductions (parking, athletic tickets). The committee's own inquiry to the Office of the Provost yielded the following statement: "*I was able to find some 2009 correspondence that indicated the savings for the 2009-2010 academic year (athletic ticket discounts and Lied Center free tickets) would be ca \$490,000—enough to fund 11 staff positions. That was important at that point, as we were facing the very real prospect of lay-offs.*" (J. Johnson, 4/20/12)

The committee noted in the proposed updating of the retiree handbook use of the word "suspend" (in contrast to "end" or "terminate") with regard to certain benefits. Such language suggests that these benefits (and in particular Lied Center tickets) will, at some point, be reinstated. The committee would ask the University Senate whether it might be able to find out when might that occur? What are the university's plans in this regard?

The committee would further urge University Senate to keep these "suspended" items/benefits "active" and to work with the administration toward the reinstatement of these benefits and/or propose other real benefits to retirees for their prior dedication and service to the university.



The committee will resume its work in the fall—although uncertain about the committee's leadership.

Respectfully submitted: James Lichtenberg (acting chair)

Date: May 8, 2012

## Appendix F

### FY-13 COMMITTEE ON RETIREES RIGHTS AND BENEFITS

Approved by SenEx: 5/29/2012

Approved by University Senate:

- For further information or to schedule a meeting with SenEx to discuss charges or the committee's work, contact SenEx chair Chris Crandall at Crandall@ku.edu.
- Please send minutes of each meeting to University Governance, at govern@ku.edu, for posting to the Governance web site.
- Please send recommendations for changes to the University Senate Code, the University Senate Rules and Regulations, and the Faculty Senate Rules and Regulations as early in the academic year as possible. Because of the waiting periods involved in changes to these documents, recommendations proposed after spring break may remain pending the following fall semester.
- Please send a report of the committee's actions on each of the charges, as well as any recommendations the committee wishes to make concerning charges or membership for the following academic year, to University Governance, at govern@ku.edu. Please include the names of committee members and submit the report by April 1, 2013. If the committee still expects to conduct business after April 1, please submit a report by April 1 and later submit any addenda that may be appropriate.

Standing charges:

5. Promote all appropriate means of communication with retirees, with special emphasis on seeking information from them about their needs and concerns.
6. Consult the Department of Human Resources/Equal Opportunity and the Office of the Provost on the maintenance of an up-to-date contact list for retirees. (ongoing)
7. Consult with SenEx about views and concerns related to retirees.
8. Seek feedback from retirees and University offices about the *Retirees Handbook* and work with staff to ensure that it remains current. (ongoing)

Specific charges:

1. Work directly with staff from HR/EO to expand that office's "Exit Survey" to include questions specifically related to retirees' concerns. Report recommendations or actions to SenEx by 02/1/13.
2. Identify recently suspended retiree benefits.
3. Prepare presentation to University Senate on these recent changes, with the goal of guiding University Senate action on these matters.