

University Senate Retirees Rights and Benefits Committee Final Report FY2019

Committee Membership:

Chair: Elspeth Healey, Libraries (2019)

Retired Faculty: Doug Houston (2019)

Unclassified Staff: Sandy Patchen, Public Safety Office (2021)

Retired Unclassified Staff: Susan Gronbeck-Tedesco (2021)

University Support Staff: Amy Ireland, Watkins (2019)

Retired University Support Staff: Dennis Constance

Ex officio, non-voting: Chris Brown, Vice Provost, Faculty Development

The committee held four full committee meetings during FY2019: September 26, 2018, October 31, 2018, March 15, 2019, and April 11, 2019. Additional committee work was conducted via email.

FY2019 Standing charges:

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

In the fall, the committee liaison to the Endacott Society, Doug Houston, approached the current Endacott Society President about the possibility of arranging a meeting with Endacott Society members. Since the committee had met with the Endacott Society the previous year, it was determined that given the Endacott Society's busy schedule of events there wouldn't be a separately scheduled meeting, but that the lines of communication would be kept open through committee liaison Doug Houston. The committee is eager to hear from all retirees and encourages them to reach out with questions, concerns, or suggestions to any committee member.

Standing Charge 2: Consult with SenEx about views and concerns related to retirees.

No special issues pertaining to retirees arose through SenEx during FY 2019. The committee did consult with Governance about any revisions necessary to the language on "Voting Privileges" in the [Information for University Retirees and Phased/Prospective Retirees](#) document (formerly known as the Retirees Handbook). Governance had no further revisions or updates for the existing entry.

Standing Charge 3: Seek feedback from retirees and University offices about the Retirees Handbook and work with staff to ensure that it remains current. (ongoing)

The Retirees Rights and Benefits Committee assists in the maintenance of the Retirees Handbook, a document officially known as "[Information for University Retirees and Phased/Prospective Retirees](#)." In FY2018, the Retirees Handbook underwent a major update, and it was redeposited in the policy library as a "guideline" after a period of absence. In FY2019, committee members once again undertook contacting different KU departments, offices, and partners for updates to and/or revisions of their respective entries, which detail the services and benefits available to retirees. The committee also sought feedback from Human Resources on the revision. It is anticipated that the FY 2019 revision will be deposited in the Policy Library by the end of April or early May. Last year's committee developed a list of contacts for each entry, and this year's committee will update that list for the use of future committees.

FY2019 Specific charges.

Specific Charge #1: Review and, if necessary, update the Committee's standing charges.

At present, the standing charges adequately capture the general mission and goals of the committee.

Specific Charge #2: Survey retiree policies at peer institutions to help identify additional and/or new low-cost steps that the University can take to make KU more "retiree friendly."

In the fall the committee began a survey of policies regarding low and no-cost benefits and perks offered for retirees by KU's official peer institutions: Indiana University Bloomington; Michigan State University; University at Buffalo, SUNY; University of Colorado at Boulder; University of Florida; University of Iowa; University of Missouri–Columbia; University of North Carolina at Chapel Hill; University of Oregon; University of Virginia. The survey began with committee members identifying relevant policy websites at each institution. The committee next emailed relevant contacts at each of these peer institutions, specifying the websites and policies they had identified and seeking suggestions for further information that committee members may have overlooked about benefits and discounts offered to retirees or about perks particularly prized by retirees at KU's peer institutions. The committee's emails yielded some helpful responses, but in some instances generated no additional information. The committee has begun the process of mining the existing sources of information on benefits and services at peer institutions to produce a list of low-cost benefits or perks not currently offered at KU, but which the University might consider adopting. This synthesis work is not yet complete, and it is recommended that next year's committee work to add to this list and seek further input directly from KU retirees. This larger list should be submitted to Governance to assess the benefits and feasibility of implementing the compiled suggestions, and also shared with Human Resources for their reference.

Specific Charge #3: Work with HR to develop additional current information about the process of retiring, about post-retirement health plans, etc.

In the spring, the committee chair contacted Madi Vannaman in Human Resources to seek feedback regarding the charge of developing additional current information about the process of retiring and about post-retirement health plans. Both parties agreed that Human Resources is the best source for such information as that office is best positioned and staffed to maintain this complex and constantly-changing information. During the March 15 committee meeting, a recently-retired committee member emphasized that Human Resources maintains a detailed document about the process of retiring and retiree health plans, which, though it is not available publicly online, is emailed out to retirees as part of the retirement process. The committee scheduled a meeting in April (4/11/2019) with Melissa Cole (Benefits Manager, Human Resources) to seek further feedback regarding this charge, including how future iterations of the committee might assist HR in this work and which types of information are best maintained by HR and which might be incorporated into the [Information for University Retirees and Phased/Prospective Retirees](#) document. Melissa Cole confirmed that a detailed and individualized document is sent out to each retiring employee. This document is personalized to account for the variables at play in each retiree's specific circumstances (age, classification, partner/spouse, retirement plan, etc.). Since Human Resources was concerned that any retirement FAQ (a resource suggested by one committee member) might quickly reach the length of a novel due to all of the potential variables it would need to take into account, another committee member suggested including a "Retirement Checklist" with the document that HR sends out.

The goal of the checklist would be to help retirees navigate the wealth of information available to them in the individualized email document, and remind them of specific important “to dos” as part of the retirement process. Melissa Cole also highlighted the annual week of [Financial Planning Awareness & Pre-Retirement Planning Seminars](#) as an important resource for prospective retirees. The week of seminars is usually held in the spring, as most individuals retire in accordance with the academic calendar (this year’s seminars were held March 25-29, 2019, with some seminars available for online streaming April 1 through April 30, 2019). It is recommended that the committee continue its conversations with Human Resources to pursue the possibility of creating a checklist for inclusion with the individualized email retirement document.

Specific Charge #4: Determine if there should be an official Retirees website.

The FY15 Retirees Rights and Benefits Committee initiated (though never completed) a draft of an “Opportunities for 60+” website (<https://retirees.drupal.ku.edu/>), intended to provide a range of information to retirees about benefits and retiree life in Lawrence. In FY18, the committee determined that this website should be suppressed from KU searches as it was incomplete and contained out-of-date documents and information. Following from discussion at several committee meetings during FY19, the committee agreed that maintaining such a site was not feasible or advisable (especially as committee members do not have permissions to edit it themselves). However, committee members recognized the potential value of some of the information initially envisioned for the site and suggested that it be migrated to resources that are updated on a regular schedule, such as the “[Information for University Retirees and Phased/Prospective Retirees](#)” document and existing sites maintained by Human Resources and the Endacott Society. To this end, the committee recommends that the draft site be crawled (so that it is documented for future iterations of the committee) and then unpublished or deleted.

Additional FY 2019 Committee Recommendations:

The purpose of the Retirees Rights and Benefits committee is to “promote communication with retirees, support their participation in the life of the university, inform retirees of their rights, and otherwise improve the experience of retirees both as an acknowledgment of valued service and as an important asset for the university.” In furtherance of this goal, the committee recommends that Governance increase the size of the committee for FY20, returning to the past practice of having two active faculty members on the committee, and possibly adding an additional unclassified or support staff committee member. This will help in accomplishing the committee’s annual activities (such as revising and updating the “Information for University Retirees and Phased/Prospective Retirees” document) as well as its variable specific charges assigned by Governance each year.

Report respectfully submitted by:

Elspeth Healey
Chair, FY 2019 Retirees Rights and Benefits Committee