

# KU University Senate Retirees Rights and Benefits Committee

## Final Report FY 2024

Prepared by: University Senate Retiree Rights and Benefits Committee  
(Beth Benfield; Co-Chair, Patrick Lansdon; Co-Chair, David Ekerdt, Gary Minden, and Amy Mendenhall)

Retired KU faculty and staff are the memories of KU. They have heard the stories of their predecessors and lived and worked through more recent events. KU retired faculty and staff want to remain connected to their departments, their school, and the university. KU should embrace, encourage, and support retirees' commitment to the university. Our premise is that the KU Community benefits from continuing, productive connections between students, departments, colleagues, KU and retired staff.

- It is in KU's interest to maintain efficient and effective procedures that can guide retiring workers through the transition from employment to retirement. From an institutional perspective, retirement processes are necessary for ensuring succession within units while holding to the mission of the university.
- Ongoing connections and goodwill between KU and its retirees benefit former employees and the University of Kansas. Many retirees continue to have an interest in scholarly activities and education. For those still active in research and publishing, the university can offer continued access to research facilities, libraries, labs, software, graduate education, and general services. KU can provide retirees with meaningful recognition for their contributions—past, present, and to come. Active outreach and signs of consideration and respect can reinforce positive sentiments and can assure retirees that they can look back on careers with satisfaction.
- By the same token, KU's institutional mission can benefit from ongoing connections and goodwill between KU and its retirees. The 2023 Retirees Survey reported that 82% of respondents reported that "In retirement, KU has remained important to me." KU can call upon a dedicated and highly qualified pool of professionals who are eager to work and make a contribution. Schools can benefit from the disciplinary and institutional knowledge that retirees share. Retirees can provide schools with entrée to networks of government, industry, and other experts with whom they have collaborated over many years. Retirees can be recruited to participate in campus research endeavors. Retirees can mentor students and unit personnel. Ongoing scholarship reflects well on KU. In addition to financial support, retired staff and faculty are eager to share their experiences with alumni, parents, colleagues, and other universities.

### Recommendations

1. For these reasons, KU should, via the Department of Human Resource Management, maintain and improve transition protocols and rituals that provide information and

planning at the pre-retirement stage. Those nearing retirement should have clear guidance as to exit steps and navigating retirement benefits. Those already retired deserve clarity about the amenities and considerations that KU extends to them.

In that regard, this past year:

- a. We had productive exchanges with HRM personnel about the availability and accessibility of information describing post-retirement amenities and benefits.
  - b. We sought to clarify reasons for the discontinuance to retirees of IT support and access to software.
  - c. We have prompted KUCR to review policies about responsibility for retaining access to digital research resources post-retirement, such as data generated by sponsored projects.
  - d. Human Resources are continuing to provide voluntary sessions of “Financial Planning Awareness and Pre-retirement Services” for retirees.
  - e. A pre-retiree discussion, sponsored by Endacott Society, was provided in Fall 2023 and plans to repeat in Spring 2024.
2. The “Final Report of the 2023 KU University Senate RRBC Retirees Survey” continues to yield insights relevant to departments and units.
    - a. Retired members in large proportion want ongoing connection to the departments and units where they had been employed. Retirees would enjoy news about hires, new initiatives, lectures, events, and student achievements. The Survey showed that fewer than half (48%) felt that they received such information. Communication of this sort would not be administratively burdensome.
    - b. The 2023 survey revealed lingering discontent with KU that can be traced to experiences that occurred at the department or unit level during the retirement transition or afterward. Only 31% agreed that “My former department makes me feel like I still have something to contribute.” The department or unit’s handling of some retirements left a bad taste. Some felt pressure to retire; work was piled on at the end; knowledge transfers to others were clumsy. In vacating an office, some could have used help with the disposition of research and scholarly materials. Several respondents reported the unit’s indifference to the event of their retirement, cursory acknowledgement, or even a void of recognition. Deletion from the departmental web pages, when it happened, felt dispiriting. We recommend the preparation of a set “best practices” for handling relations and maintaining goodwill with retiring workers, advice that higher administration can circulate to unit heads.
  3. With the 2023 survey as a baseline, we recommend a periodic survey of KU retirees to evaluate satisfaction with KU’s retirement transition practices, satisfaction with communications from the university, and the sufficiency of support for scholarly and

scientific productivity still being conducted under the KU banner. A survey can also identify areas of misunderstanding. Such a survey can also disclose retirees' interest in assisting the mission of the KU community with time and financial resources.

4. The current 4<sup>th</sup> Standing Charge has intellectual merit to maintain a list of retirees who would like to serve on this committee. However, the logistical capabilities are not fully developed nor available for this committee to carry out the charge as issued. Due to the difficulty of maintaining an up-to-date contact list for KU retirees, the committee suggests changing or removing the 4<sup>th</sup> standing charge. Participation is vital to the success of current and future retirees, so we recommend utilizing Human Resources' contact list and partnering with the Endacott Society to announce openings and call upon interested participation with the committee as a specific charge.
5. The committee strives to ensure clarity regarding current retiree benefits and procedures. We are working with offices that provide information describing the transition from employment to retirement to ensure that said information is clear and understandable. These conversations resulted in the creation of specific charges for next year.