

**University Senate Retirees Rights and Benefits Committee
Final Report FY2018**

Committee Membership:

Chair: Elspeth Healey, Libraries (2019)
Faculty: Mark Ferrell, Music (2019)
Doug Houston, Emeritus Faculty (2019)
Unclassified Staff: Ruth Hatfield, EDU Social & Bio-behavioral SSC, (2018)
Retired Unclassified Staff: Vacant
University Support Staff: Amy Big Eagle, Watkins (2019)
Retired University Support Staff: Dennis Constance
Allen Wiechert, President of Endacott Society (or designee)
Ex officio, non-voting: Chris Brown, Vice Provost, Faculty Development

The committee held two full committee meetings during FY2018: October 3, 2017 and January 16, 2018. In addition to this, individuals from the committee met with SenEx on October 31, 2017 and the Endacott Society on January 10, 2018. Additional committee work was conducted via email.

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

On January 10, 2018, committee chair Elspeth Healey and committee member Doug Houston met with a group of approximately 40-60 Endacott Society members, as facilitated by Endacott Society President Allen Wiechert. Healey provided a brief update on the committee's activities to date, shared a draft of the 2015 Retiree Handbook, and solicited feedback on retiree concerns and ideas. The feedback offered at the meeting is summarized, clustered by subject, in **Appendix 1: Endacott Society Meeting Notes**, and several suggestions are also noted elsewhere in the body of this report.

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

The primary point of consultation with SenEx during FY2018 was with regards to a proposal brought forward by Professor Emeritus Felix Moos over the summer of 2017. At the fall committee meeting on October 3, 2017, Professor Emeritus Moos visited to discuss his "Silverhawk" initiative proposal, which sought to create an official, named volunteer program for retired faculty interested in contributing to KU's teaching and learning mission through volunteering their expertise. The committee decided that the best next step would be to raise the proposal with KU Governance, and on October 31st, Committee Chair Healey met with SenEx to discuss the "Silverhawk" proposal. SenEx engaged in a wide-ranging discussion about the advantages and disadvantages of such a proposal, and referred the matter to FacEx as the proposal primarily concerned active and retired faculty members. Committee Chair Healey could not attend the FacEx meeting on 11/28/2017 due to a conflicting appointment, but had discussed the proposal further with FacEx President Amalia Monroe-Gulick prior to the meeting. At the FacEx meeting, FacEx decided not to move ahead with the proposal at present. This was due primarily to concerns about the labor needed to implement and maintain data on volunteers and the sense that volunteers already have a forum for making their services available through contact with their former departments and deans. Please

see **Appendix 2: Silverhawk Proposal Report** for the text of the Silverhawk Proposal and a more detailed summary of the consultation process with SenEx and FacEx.

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 the fall of 2017, committee members Houston and Healey consulted with Ola Faucher in HR, and she confirmed that the most up-to-date version of the Retirees Handbook was the version dated May 17, 2015, available via <http://humanresources.ku.edu/retirees-associates-homepage>, at the link <http://humanresources.ku.edu/sites/humanresources.drupal.ku.edu/files/docs/Information%20for%20University%20Retirees%20and%20Phased%20or%20Prospective%20Retirees.pdf>. [Note: this link will become obsolete as the revised handbook is deposited in the policy library.] One major area of concern was that almost all of the links in the 2015 edition were non-functional.

Using the text of the May 17, 2015 handbook as its basis, the committee solicited updates from the organizations and campus units listed in the handbook and received additional updates and feedback from HR. As of April 8, 2018, the committee has succeeded in gathering revised information for 24 of the 27 handbook entries, including information detailing additional benefits for retirees not previously noted. By the end of April 2018, the revised Handbook will be published and may additionally be re-deposited in the Policy Library, where it had once been housed.

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: Follow-up and monitor the changes and links to the retiree handbook from specific charge 3.

See discussion under Standing Charge 3.

Specific Charge 3: Consider specific steps that the University can take to make KU more “retiree friendly,” particularly those steps that have low financial costs.

The discussion with the Endacott Society raised several steps that the University might undertake to make KU more retiree friendly. One suggestion was extending KU Libraries’ “TripSaver” service to retirees, and designating the Adams Alumni Center (where the Endacott Society is housed) as a possible delivery location. The Libraries have approved this request, though retirees will need to email acqrs@ku.edu

specifying Adams Alumni Center as their location after they submit their TripSaver request. Another potential step would be improving the parking options on campus for retirees. Given the limited availability of parking on campus, this proposal would not be simple or cost-free, but would greatly improve the accessibility to retirees of resources and activities on campus. The committee recommends that the University Senate consider making exploring improved parking options for retirees a joint FY2019 specific charge for both the Retirees Rights and Benefits Committee and the Parking Commission. Several retirees suggested an interest in participating in the workshops, seminars, and screenings made available through HealthQuest. Committee member Houston investigated this possibility with HR and confirmed that at present it is not possible for retirees to participate in these educational elements of the HealthQuest program. This is a matter of state policy rather than simply KU policy. To pursue this matter further in the future, the committee might determine who is responsible for negotiating the contract with the outside vendor overseeing the HealthQuest program (Cerner) and querying whether the contract could be renegotiated to allow for retiree participation. The issue might also be pursued by contacting state representatives Tom Sloan and Marci Francisco.

To facilitate the further investigation of specific low-cost steps that the University might undertake to make KU more retiree friendly, the committee suggests tasking it with a FY2019 specific charge to survey retiree policies at 5-10 peer institutions and consider whether any ideas gained from this survey might be implemented at KU.

Specific Charge 4: Work with HR to develop additional current information about the process of retiring, about post-retirement health plans, etc.

The Retirees Handbook provides information regarding several issues pertinent to the process of retiring, including basic information on health insurance, change of address forms, research assistance, parking permits, library privileges, etc. The committee did, in collaboration with HR, revise and update the majority of these Handbook entries. However, due to the other work of the committee this year, it was not able to undertake developing additional or new documentation beyond what is provided in the Handbook. If this remains a priority for SenEx next year, it would help guide the work of the committee to receive a charge that specifies what new documentation it would like to see created (i.e., how it might cover different territory from what is already covered in the Handbook).

Specific Charge 5: Finalize the official website (i.e., <https://retirees.drupal.ku.edu/retirees-handbook>) with the KU Retirees Handbook.

The Drupal website referenced above was a project undertaken by an iteration of the Retirees Rights and Benefits Committee several years past. However, since the website was never completed, since its information is duplicative and/or obsolete, and since no members of the current committee have access or editing privileges for the site, the committee worked with Ellen Slikker, Administrative Associate Senior for KU Governance, to suppress the site from all KU search results. The KU Retirees Handbook will be hosted centrally through HR and/or (potentially) through the Policy Library. If possible, the committee would recommend “unpublishing” the site entirely.

FY 2018 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 makes the following recommendations for FY2019:

- 1) That the vacant “Retired Unclassified Staff” position on the committee be filled for FY2019 and that the “Unclassified Staff” position be renewed or filled with a new member as the current member’s term expires this year.
- 2) That the committee ensures that it meets its standing charge of ***annually*** revising the Retiree Handbook (also known by its official title “Information for University Retirees and Phased/Prospective Retirees”), as retirees must be able to rely on the accuracy of the information in this document. Moreover, revising the document becomes a much more labor-intensive process for the committee when it is several years out-of-date.
- 3) That University Senate jointly charge the Retiree Rights and Benefits Committee and the Parking Commission to explore improved parking options for retirees as parking has been raised as a key impediment for retirees wishing take advantage of the other benefits and services KU offers its retirees.
- 4) That University Senate task next year’s committee with the specific charge of surveying retiree policies at 5-10 peer institutions in order to help identify additional and/or new low-cost steps that the University might undertake to make KU more retiree-friendly.

Report respectfully submitted by:

Elspeth Healey
Chair, FY 2018 Retirees Rights and Benefits Committee