Retirement Issues Committee Combined Annual Reports for 2013-2018

I. Function, *Faculty Policies and Procedures* 6.50
   1. Review and make recommendations on university services relating to retirees.
   2. Review and make recommendations on services relating to retirement planning.

II. Activities
The Retirement Issues Committee (RIC) took a hiatus for a few years and re-grouped in late 2016 with a refreshed charge and slimmed down membership. Faculty Document 2649 (7 November 2016), modified the RIC in *Faculty Policies and Procedures* as follows:

6.50. Committee on Retirement Issues.
   A. MEMBERSHIP. appointed for three-year terms:
      1. Five Three active faculty members appointed by the University Committee for three-year terms.
      2. Five Three active academic staff members.
      3. Five Three active classified university staff members.
      4. Ten Five retired members appointed by the UW-Madison Retirement Association
      5. The chair shall be appointed by the University Committee from among the faculty members appointed pursuant to A.1. Academic staff and classified university staff appointed pursuant to A.2. and A.3. may be appointed to serve as co-chair.

Also in late 2016, the University Committee proposed that RIC explore several topics of interest to faculty, staff, and the UW-Madison Retirement Association. Many of these were addressed in the subsequent meetings as outlined in the rest of this report. The RIC met three times in the spring of 2017, twice in fall 2017, and three times in spring 2018.

The RIC looked at including retired university employees on *Faculty Policies and Procedures* Shared Governance (“Chapter 6 committees”). After a proposal was drafted and revised by a subcommittee in the fall, further consultation with the secretaries of the faculty and academic staff over the winter indicated the overall infeasibility of such a proposal. Whereas a blanket request for inclusion of a retiree member on several committees initially seemed to the RIC a good way to go on grounds of principle, the reality is that each committee has its own history and politics that makes this principled approach difficult to pursue. Moreover, the process by which retiree members would be chosen seemed complicated and likely enormously time-consuming, and would not assure the appointment of willing volunteers. However, if retirees want a voice in governance issues, a more practical start would be to attend the relevant committee meetings.

A second main area of attention was working with the Office of Human Resources (OHR) to address various areas of phased retirement. Graduated retirement is already possible on campus, but it is handled on an individual basis. This was discussed further in the April 3, 2018 RIC meeting, including how to make better known how employees might pursue this, especially University Staff, who meet essential needs and cannot go down to part time without that time being replaced.

OHR was in the process of revamping its benefits pages ([ohr.wisc.edu/benefits/retirement/](ohr.wisc.edu/benefits/retirement/)) and RIC reviewed draft pages on retirement. Beyond specific editing suggestions, RIC urged including another section right at the beginning about non-financial considerations about retirement. Among other things, this could include Seltzer’s “If I Knew” document (see page 5), which the chair sent to Stern. In addition, RIC suggested consulting with Cultural Linguistic Services for selected translation into the other four supported languages.
IV. Current and Future Issues

- Continue to encourage retirees to be involved with shared governance committees
- Develop guidelines (with OHR) on how to approach retirement (including phased and transitional retirement) with employees in ways that don’t impinge on or threaten employees not yet ready to retire
- Consider developing a peer mentoring system or other mechanism to provide a retiree mentor or other point of contact for discussing retirement-related issues
- Revise university’s volunteer policy with respect to retirees from all employee groups. What activities can retiree volunteers engage in? With respect to retirees and volunteers who have disabilities, what are UW’s legal obligations under ADA?
- Help develop relations between retirees and Alumni Association
- Increase effort to inform all people in the university of the pertinent issues before they retire
  - Requirements and information from the Office of Human Resources
  - Benefits of membership in the UW Retirement Association
  - Benefits of emeritus if applicable

V. Summary/Recommendations

The RIC adopted a document drafted by committee member Rob Seltzer, “If I Knew Then What I Know Now: Tips on Retiring Well from the UW-Madison” (see Appendix, page 4)

VI. Membership, Faculty Policies and Procedures 6.50 (since December 2016)

1. Three active faculty members for 3-year terms.
2. Three active academic staff members, 3-year terms.
3. Three active university staff members, 3-year terms.
4. Five retired members appointed by the UW-Madison Retirement Association, 3-year terms

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<tr>
<th>2017-2018 Faculty [term ends]</th>
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<tr>
<td>Lynn Nyhart, History of Science, [2018], chair</td>
<td>Tom Broman, History of Science, [2019], chair</td>
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<td>Hill Goldsmith, Psychology, [2019]</td>
<td>Lynn Nyhart, History of Science, [2018], chair</td>
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<th>2017-2018 Academic Staff [term ends]</th>
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<td>Carol Hulland, Obs &amp; Gyn, [April 2018-2020]</td>
<td>Mark Lindquist, Business, [2018]</td>
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<td>Mark Lindquist, Business, [2018]</td>
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<th>2017-2018 University Staff [term ends]</th>
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<tr>
<td>Brian Shore, DoIT, [2019]</td>
<td>Brian Shore, DoIT, [2019]</td>
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<td>vacant</td>
<td>Christine Legler, Family Medicine, [2017]</td>
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<th>2017-2018 UW Retirement Association (annual terms)</th>
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<tr>
<td>Darrell Barth</td>
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<td>Bill Richner</td>
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<td>Rob Seltzer</td>
<td>Rob Seltzer</td>
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Membership, *Faculty Policies and Procedures* 6.50 (prior to November 2016)

1. Five active faculty members for 3-year terms.
2. Five active academic staff members, 3-year terms.
3. Five active classified staff members, 3-year terms.
4. Ten retired members appointed by the UW-Madison Retirement Association, 3-year terms

**2015-2016**

*Faculty [term ends]*

- Michael Gould, Oncology [2016], chair
- Lynn Nyhart, History of Science [2018]
- Robert Radwin, Biomedical Engineering [2017]
- Michael Schatzberg, Political Science [2017]
- Bruce Thomadsen, edical Physics [2016]

*Academic Staff [term ends]*

- Sandy Bertics, Dairy Science [2017]
- Mary Condon, Student Fin Services [2017]
- Shelly Godar, Waisman Center [2017]
- Steven Limbach, Physics [2016]
- Michael Maroney, Res Animal Res Ctr [2016]

*University Staff [term ends]*

- Christie Legler, Family Medicine [2017]
- Mary Murray, University Housing [2017]
- Thomasin Propson, Human Resources [2017]
- Jodi Roberts, Human Resources [2017]
- Brian Shore, Appl Dev & Integration [2017]

*UW Retirement Association (annual terms)*

- Darrell Barth, Treasurer
- Phil Certain, Past President
- Bob Dye, President
- Gary Mitchell, President-Elect
- Bill Richner, Secretary
- John Helgeson, Board Member
- Dorothy Klinefelter, Board Member
- Diane Kravetz, Board Member
- Cora Marrett, Board Member
- Ann Wallace, Executive Director

**2014-2015**

*Faculty*

- Michael Gould, Oncology. [co-chair]
- Dennis Miller, Art
- Robert Radwin, Biomedical Engineering
- Bruce Thomadsen, Medical Physics
- Michael Schatzberg, Political Science

*Academic Staff*

- Sandy Bertics, Dairy Science
- Steven Limbach, Physics
- Michael Maroney, Res Animal Res Center
- Shelly Godar, Waisman Center
- Mary Condon, Student Financial Services

2014-2015 membership, continued

*Classified Staff*

- Christie Legler, Family Medicine
- Thomasin Propson, Human Resources
- Jason Rittel, Housing
- Jodi Roberts, Human Resources
- Brian Shore, IT/App dev & Integration

*UW Retirement Association*

- Darrell Barth
- Dale Burke
- Phillip Certain
- Judith Craig
- Richard Daluge
- Robert Dye
- Barbara Erlenborn
- Jan Richardson
- William Steffenhagen
- Ann Wallace
Appendix

Are you RETIRED? CLOSE to retirement? THINKING about retirement? FAR away from retirement?
This is for you.

If I Knew Then What I Know Now - Tips on Retiring Well from UW-Madison
By Rob Seltzer

1. Plan for retirement:
   a. Financially
   b. Socially
   c. Physically (view “23 ½ Hours” on YouTube)
   d. Emotionally

2. Know your benefits
   b. Understand your pension benefits.
   c. Know how sick leave converts to pay health insurance premiums.
   d. Understand emeritus status, what that offers, and if you qualify.

3. Know the benefits of UWRA membership.

4. You may be asked to join many organizations. Try not to agree to join anything for six months. Then be selective.

5. Explore continuing education opportunities including free university courses (after age 60), Plato, etc. See: continuingstudies.wisc.edu/senior-learning/

6. Consider pursuing your avocations more in retirement.

7. Do the things you never could do when working.

8. Follow your passion.

9. Keep active in retirement. It is important to remain physically active by taking walks, walking up and down stairs regularly, maybe join a gym, become a “mall walker”, etc.

10. Pick up a hobby you may have put on the back burner while working.

11. Consider volunteering to fill your time (if needed) or devote time to giving back to our wonderful community (campus and locally).

12. You may have more money at the end of every month than while working. You no longer contribute to a retirement fund (or contribute less). If you went out for lunch or frequently brought in dinner because you were too tired to cook, you may save considerable money. You save money on clothing for work as well as parking.

13. You will receive more unsolicited phone calls during the day than you ever imagined, even if you are on the No Call list. If you intend to keep a land-line, change out your system to get one that has multiple handsets (so you are always pretty close to a phone) and provides a Call Block button on each handset. That way you can glance at the caller ID and immediately block the call if you don't want to take it.

14. If you get bored you can go back to work part time. Be sure to understand any impacts this may have on your benefits.

15. You will likely adjust to being retired very quickly and easily!