Fall 2020–Summer 2021:

a) Developing survey to send to current university employees (all categories) and to retirees to:
   a. gauge awareness of retirement resources available through UW OHR;
   b. gauge satisfaction with resources available;
   c. serve as an education tool alerting employees to resources and tools available to support retirement planning;
   d. identify gaps in resources and tools to support employees in preparation for retirement throughout career at UW.
   *Project timeline – launch survey in spring 2022*

b) Developing a definition for “normalizing retirement”, promoting the idea of retirement as another step along life’s journey. This incorporates well-being that encourages financial literacy along with a manageable savings plan regardless of salary and expenses, and lifelong learning.

c) Meetings with Vice-Provost Beth Myerson, and Secretary of the Faculty Heather Daniels – how can RIC support their office’s goals for supporting employees through retirement transitions?

**Committee members, FY21:**

Faculty – Rania Huntington, Cliff Robb (committee co-chair), Alan Sidelle
Academic Staff – Carol Hulland (*committee co-chair*), Ruth McNair (retired spring 2021), Mario Pennella, Fabu Phillis Carter
University Staff – Lee Bilke, Catherine Carter, Susan Hyatt
UWRA - Mary Czynszak-Lyne, Marian Fisher, Sandi Haase, Christopher Kleinhenz, Esther Olson, Beth Zemp

Fall 2019-Summer 2020:

a) Presented a 90 minute workshop on retirement preparation, particularly related to financial preparation, and understanding employee benefits related to retirement, at Construct Your Career@UW (March 2020)

b) Reviewed retirement resources available through UW OHR with Thomasin Propson

c) Identified gaps in retirement resources through committee brainstorming sessions, and in conversation with Vice Provost Michael Bernard Donals; one recurring concept to explore – identify a specific position for a “retirement concierge” service; someone who can help employees identify resources beyond scope of HR to prepare for retirement; reviewed retirement planning processes at other universities
Committee members, FY20:
  Faculty – Rania Huntington, Cliff Robb, Claude Woods (committee co-chair)
  Academic Staff – Carol Hulland, Louis Loeffler (committee co-chair), Ruth McNair
  University Staff – Lee Bilke, Catherine Carter, David Rieves
  UWRA - Mary Czynszak-Lyne, Christopher Kleinhenz, Bill Richner, Rob Seltzer, Beth
  Zemp
  Friend - Sandi Haase

Fall 2018-Summer 2019:
  a) Reviewed OHR benefits resources available online. Submitted recommendations to make
     easier to access on website.
  b) Reviewed Emeritus guidelines. Submitted recommendations for language to clarify
     eligibility, particularly for employees other than faculty.
  c) Met with Patrick Sheehan to identify role of RIC, and particularly of retirees in volunteer
     activities on campus. Reviewed draft UW volunteer policy and submitted committee
     comments.

Committee members, FY19:
  Faculty – Hill Goldsmith, Rania Huntington, Claude Woods (committee co-chair)
  Academic Staff – Carol Hulland, Louis Loeffler (committee co-chair), Ruth McNair
  University Staff – Catherine Carter, Nancy Hilmanowski, David Rieves
  UWRA – Darrell Barth, Mary Czynszak-Lyne, Sandi Haase, Diane Kravetz, Bill Richner,
  Rob Selter
  UWRA friend – Sandi Haase