Ad Hoc Committee on Classified Staff Issues
Final Report May 2013

by Nancy Kunde, Chair

Committee Members: Debbie Lauder, Bob Dye, Jim Hanson, Joan Calkins, Jan Richardson, Barb Erlenborn, Pat Whipple, Ann Wallace, Judy Craig, and Nan Kunde (Chair)

Following a discussion about increasing membership and involvement of classified staff in the UW Retirement Association (UWRA), Judy Craig suggested the creation of an ad hoc committee to investigate the topic. At the January 12, 2012 board meeting, Judy Craig, Jim Hanson, and Nan Kunde agreed to convene a small working group to focus on recruitment of classified staff to UWRA.

Craig, Hanson, and Kunde met informally in February and talked about a number of ideas including developing focus groups with recent classified retirees, meeting with Mark Walters (Director of Classified Personnel), identifying campus groups and organizations whose members are largely classified staff, developing a brochure targeting classified staff, and a Benefits Fair presentation. It was also suggested that a letter from the provost be sent to deans, directors, department chairs about the benefits of the retirement association noting the UWRA website.

Additionally, a major focus of the ad hoc committee was identifying ways to inform and encourage classified staff contemplating retirement to seek emeritus status. There was general consensus that many classified staff are simply unaware that they may be eligible for and can apply for emeritus status.

In June 2012, Kunde convened an expanded ad hoc committee. Debbie Lauder and Joan Calkins were added to the committee. Following this meeting, a session--"If I had known then, what I know now"--was developed for the annual campus Benefits Fair. Panelists would represent all UW personnel categories. Bill Steffenhagen agreed to be panel moderator. This type of presentation had been a part of the Benefits Fair but had been dropped some years ago.

Additionally, a number of campus groups whose members are exclusively or largely classified staff were identified, and it was agreed that ad hoc committee members would work to have discussion of UWRA membership and classified staff retirement concerns--particularly emeritus status--placed on their respective agendas.

The session was presented at the Fall 2012 Benefits Fair and was very successful and well attended.

The ad hoc committee convened again in December 2012. Jan Richardson joined the group. The focus of the discussion was emeritus status. The committee agreed that a flyer be developed that would address benefits of and process to achieve emeritus status. The flyer was also to address the mission and goals of UWRA. Lauder and Kunde drafted the flyer following the meeting.

At the January 2013 meeting of the ad hoc committee, the draft was shared with Mark Walters. Walters noted that he has seen an increase in emeritus status applications but also stated that it is important that classified employees as well as administrators in their employing units be
Richardson and Kunde did meet and share the draft flyer on emeritus status with the Council for Non-Represented Classified Staff.

Because of concerns about duplication of existing published information regarding emeritus status, the draft flyer has been substantially revised focusing more on emeritus status as an individual initiative and formatted more as a guidance or fact sheet from the UWRA. The redraft has been completed and referred to the UWRA Communications Committee for their review and consideration for possible placement on the UWRA website.

The ad hoc committee met for a final time in March 2013. Several of the initial suggestions and concerns addressed by the committee about increasing membership and involvement by classified staff were reviewed. The consensus was that many of them have been or could be incorporated into other UWRA standing committees. For example, the Membership Committee could be expanded to include a classified retiree or perhaps a subcommittee of that committee created to address classified retiree concerns. A number of social activities were suggested as a result of an informal survey conducted by Erlenborn and Whipple. Those activities could be referred to the UWRA Social Committee. (Richardson, chair of the Social Committee, has since convened a focus group to brainstorm ideas for social activities.)

Increasing membership and involvement of classified staff and retirees remains an issue for UWRA. The activities and suggestions resulting from the work of the ad hoc committee provide potential ways to make changes in this area. In summary, some of the them include the following:

-- addition to the Membership Committee of classified retirees and/or a subcommittee to address classified retiree concerns
-- expanded Social Committee activities that may be of particular interest to classified retirees
-- continued participation in the annual campus Benefits Fair
-- continued communication with Classified Personnel Office to insure that classified employees are made aware of UWRA and the potential of emeritus status
-- communication with campus groups and organizations whose membership is largely or exclusively classified staff.

Sincere thanks to the members of the ad hoc committee for their time and contributions to the work of the committee.