

BUILDING BRIDGES WITH RETIREES: BEST PRACTICE SUGGESTIONS FROM UNIVERSITY OF WISCONSIN-MADISON DEPARTMENTS AND UNITS*

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A recent (2004) questionnaire sponsored by the University of Wisconsin-Madison Committee on Retirement Issues indicates that campus units vary greatly in the degree to which they plan for retirement and remain connected to retirees once they leave. Units that think about retirement on an on-going basis and pro-actively anticipate retirements report positive benefits for both individuals and the organization. Similar positive outcomes accrue to units that maintain strong connections with retirees who wish to remain involved. Planning for retirement and remaining connected to retirees can produce smoother and more productive work flow, improve quality of life of retirees, and expand institutional resources including time, talent, and development potential.

The Committee on Retirement Issues urges campus units and departments to think systematically about transitions associated with retirement, and to view retirees as a continuing university resource. The following suggestions, drawn from best practices described by units responding to the questionnaire, are intended to help implement these recommendations.

ANTICIPATION

- Engage in periodic active, collective thinking about what the unit should look like in the next five to ten years.
- Periodically ask all faculty, academic staff and classified staff, regardless of age, whether they plan to leave in the next three years.
- Maintain a 3 to 5-year staffing plan with potential retirements and hiring priorities.
- Interview those planning retirement about what they see as their contribution to the unit that would be most missed. This provides an opportunity to acknowledge their work and assists in strategic planning, both for replacement and identification of skills no longer important to the unit.
- Identify curricular needs created by specific retirements, and make timely adjustments to insure that dissertation and research projects are smoothly handed off.
- Advise prospective retirees about campus resources that are available to assist them in planning for retirement at all stages of their employment, not just in later years. These include Employee Compensation and Benefits Services, Wisconsin Department of Employee Trust Funds, the brochure *Privileges for UW-Madison Retirees* prepared by the UW-Madison Office of Human Resources, library archives, and the UW-Madison Retirement Association.
- Make sure units and retirees are clear about what unit resources can and cannot be continued, for example, office and laboratory space, access to telephones, computers (and computer support), photocopying, secretarial assistance, possibilities for part-time employment, parking, and so on. Misunderstandings about this issue alone constitute the largest number of difficulties described by respondents to the questionnaire.
- Ask academic staff and classified staff to write a description of their work to assist their replacements, and if possible overlap with replacements in a transition period.
- Discuss how the retiring individual wishes to have their retirement recognized (e.g., dinner, seminar, small gathering, public notices).
- Use cross-training as much as possible to lessen difficulty when unexpected retirements and/or

transfers produce gaps.

- Encourage staff to take employment-related exams when they are given so as not to have to wait for recruitment and exams.
- Maintain a base of “back up” personnel to cover unannounced or short-timeline departures (e.g., graduate students who want teaching experience). This practice can also serve to enhance mentoring of new professionals to fill planned vacancies.
- Include retirees in annual parking permit exercise.

AFTER RETIREMENT

- Include retirees in unit e-mail lists to keep them informed.
- Invite retirees to social functions, lectures, symposia, and other unit functions.
- Negotiate mutually beneficial ways for retirees to participate in the on-going business of the department unit. For example, current retirees are engaged in:
 - editing a newsletter
 - staffing an exhibit
 - supporting a unit library and computer room
 - developing national and international “sister” laboratory relationships
 - leading field trips
 - writing a unit history
 - preparing nominations for awards and memorial resolutions
 - refining grant proposals
 - serving on advisory committees
 - planning development events • organizing an annual scientific retreat
 - writing scientific articles
 - providing phone consultations on department and unit matters
 - giving seminars and colloquia
 - maintaining contacts with alumni and through them, facilitating job placements and good public relations for the unit.

*Based on a 2004 survey of University of Wisconsin-Madison campus units sponsored by the Committee on Retirement Issues.