

University System of Georgia Retiree Council

George Stanton

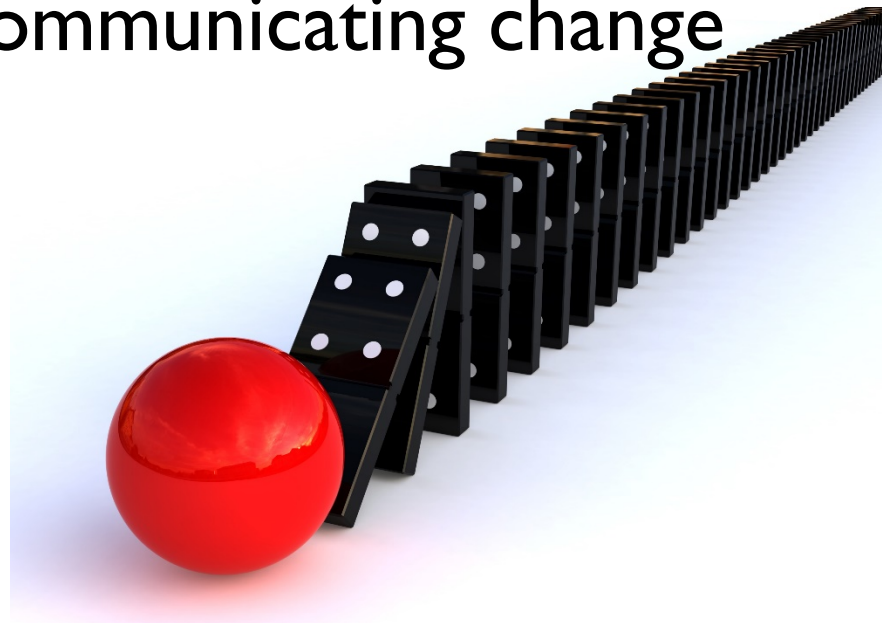
Chair, USGRC

Professor Emeritus, CSU



Change is a Catalyst

- System determines that it needs to change its approach to health insurance for retirees
- Challenges encountered when effecting and communicating change



Retiree Strategy in the USG

- **Proposal submitted to Chancellor in July 2014**
- **New Regents' Advisory Committee, the USG Retiree Council (USGRC) Approved Nov. 2014**

http://www.usg.edu/academic_partnerships_accreditation/committees

Recognized as a formal Advisory Committee to the Board of Regents (BOR) and the System Office

Building a Partnership

- **Retiree Council patterned after the USG Faculty and Staff Councils**
 - **Unique: only council with members not system employees**
- **One retiree from each of the 26 USG institutions serves on the Council**
- **System Office liaisons also members**
- **Council designed to be a partnership between the System Office and USG retirees**

Building a Partnership

- **USGRC Bylaws developed and approved (revised bylaws currently awaiting approval)**
- **Council developed and endorsed a communication document outlining strategies for communicating with all partners –USG Office, Retiree Council, all institutions**
- **Continues to monitor and advise System regarding communications issues**

http://www.usg.edu/academic_partnerships_accreditation/committees/view/usg_retiree_council

Function of USGRC

- Meets twice a year (fall and spring)
- Shares System information with representatives
- Council prepares and submits recommendations to the System



Who Has Attended Council Meetings?

- **Occasionally**
 - **Chancellor**
 - **Executive Vice Chancellor**
 - ❖ **Vice Chancellor for Academic Affairs**
 - ❖ **Associate Vice Chancellor for AA**
 - ❖ **Vice Chancellor for HR**
- ❖ **Routinely**
 - ❖ **Associate Vice Chancellor for Total Rewards**

Proposed Role of USGRC

- **Work with BOR staff to establish a USG Registry**
- **Work to maintain effective communication**
- **Work with BOR staff to explore phased retirement options for USG employees**
- **Work with campuses to establish and develop effective retiree organizations**

Proposed Role of USGRC

- **Work with BOR staff to develop policies and practices that effectively facilitate retirement transitions**
- **Work with BOR staff to promote and share institutional and system-level best practices for pre-retirement, retirement, and post-retirement**

Proposed Role of USGRC

- **Serve in an advisory capacity on USG benefit plans**
- **Promote understanding of the impact that proposed plan changes may have on retirees**
- **Advise on other retiree issues as needed**

Challenges



- 1. Some institutions appointed no representative**
- 2. Representatives appointed to the Council were not retirees**
- 3. Some institutions did not provide travel funds for retirees to attend the meetings**
- 4. Most institutions had no retiree organization. Only 6/28**
- 5. Retirees often not quick to volunteer**

Successes



1. **Now have a framework for a communication network to reach all USG retirees**
2. **Compiled best practices from USG institutions with retiree organizations; share with Council members (2016)**
3. **Promote establishment of ROs on each campus (Have grown from 6 to 16)**
4. **Provides an avenue to promote GA-HERO and AROHE**

Fall 2019 Actions

- **Communications & Retirement Transition (Since 2015)**
- **Library Access and Services (Since 2018)**
- **Retiree Well Being (Since 2018)**
- **Amend Bylaws (Since 2018)**

Communications Subcommittee

- Importance of distinguishing between active employees, pre-65 retirees, and Medicare-eligible retirees.
- Improve clarity of communications for Open Enrollment with OneUSG for employees and retirees and for Open Enrollment through Aon for Medicare-eligible retirees.

2020 Open Enrollment Communication Roadmap

Active Employees, USG Pre-65 Retirees, New Hires

May–Aug

August

September

October

Post OE–2020

Project Management

OE: 10/28–11/8, 2019

OneUSG Connect - Benefits Website & Call Center

Campaign Planning & Key Messages

Plan/Rate Change Talking Points for HR Practitioners

OE Kickoff Meetings for HR
(Dates TBD)

OE Email Series: 4 High Impact Emails

10/15, 10/28, 11/7, TBD (Pharmacy Change). 1 version for GT; 1 for remainder of USG

Campaign Design
(Minor freshening; retain same colors and fonts)

OE 2020 Preview Presentation for HR
9/23, 9/24, 9/26

Initial Email re: Plan Changes For employees & retirees
USG to create message for institutions to distribute

USG Benefits Website Content
(for OE; incl. COBRA & retiree pages)
+ Banners

Text Messaging

(Messages 1-6 sent 10/7, 10/15, 10/23, 10/28, 11/4, 11/7; messages 7-12 to be sent in early 2020)

PowerPoint Template:
Update Benefits PPT Template

OE WebEx Sessions for HR Practitioners

Anthem Materials

- Comparison Guide
- GT Comparison Guide
- Poster/Digital Display
- OE brochure (for Benefits Fairs)
- Coverage advisor (online tool)
- Update microsite: anthem.com/usg

Website Update

OneUSG Connect - Benefits Enrollment Worksheet
+ Pre-65 Retiree Benefits Summary
(For Retirees only)

Onsite Benefits Fairs and Meetings at Institutions

Welcome Kits
CVS Caremark
Any other providers?

Update Benefits Overview Video
New Hire

PowerPoint Presentation and FAQs for Benefit Fairs and Meetings

CVS MinuteClinic Personalized Mailer
Add messaging re: LiveHealth Online

Update OE Benefits Overview Video
(9/20)

Enrollment Announcement Mailer
(8.5" x 11")
1 version for GT, 1 for remainder of USG
(mail 10/1)

Voluntary Benefit Flyers
(update + create 2 new)

USG Benefits Website Content
(Post Enrollment/ 2020 New Hire)

2020 Benefits Newsletter
New Hire
(2 pages)

Targeted LifePerks Announcement
(mail 10/4)

Website Update

NEW: Benefits Orientation Presentation
New Hire

System-Generated Emails
(Confirmation of Benefits + EOI reminders)

Optum FSA, HSA communications

CVS Outreach re: Brand-Name Drugs?

Update Total Rewards Video

Active Newsletter
(2 pages)

Enrollment Postcard
(5" x 7")
1 version for GT, 1 for remainder of USG
(mail 10/30)



2020 Open Enrollment Communication Roadmap

USG Post-65 Retirees

June - July

August - September

October

2020

USG OE: 10/28 – 11/8

Medicare OE: 10/15 – 12/7

Project Management

Outreach to Retiree Advisory Council, Shared Service Center and Institution HR Teams

June Survey Email

USG Benefits Website Retiree Content (update)

Only for those with pre-65 enrollees:
OneUSG Benefits Connect OE Worksheet
 (for USG Benefits)

YSA Balance Reminder Statement Letter
 (Q1 2020)

July Email: Medicare OE awareness

Retiree Voice-Over Presentation (update)
 (9/20)

System-Generated Emails
 (for USG Benefits)

YSA Direct Deposit Email Campaign
 (Q2 2020)

2020 Approaching Medicare with Confidence Guide
 provided to USG and to newly eligible retirees

Targeted Communication
 to select retirees experiencing a disruption or who need special support

Retirement Planning Brochure (update)
 (2/14)

Annual Carrier Change Letters
 (by TBD)

FAQs and Talking Points

Renewal Letter (including 2021 HRA amount)

Note: As of 7/25/2019, USG anticipates a few additional communications from the Exchange that will speak to eligible reimbursable expenses and requirements for maintaining HRA eligibility.

Note: Aon Retiree Health Exchange has email addresses for 85% of USG participants.



Communications Subcommittee

- See updated USG HR Retiree Benefits webpage:
https://www.usg.edu/hr/benefits/retiree_benefits/
- Link there to Prepare for 2020 Benefits: Information for USG Retirees Age 65 and Older **FINALLY!**
- Importance of distinguishing between active employees, pre-65 retirees, and Medicare-eligible retirees!!



University System of Georgia Benefits



we provide · you decide



Prepare for 2020 Benefits: Information for USG Retirees Age 65 or Older

Communications Subcommittee

- Difficulties obtaining mail lists for Retiree Organizations on individual campuses and need for stronger links between campus HRs and ROs.
- Communications go both ways! Please send feedback to Dennis Marks, Chair. (dmarks@valdosta.edu).

Library Access and Services for Retirees

Kathy Tomajko (Chair)

Initial Resolutions

- Whereas retirees of the University System of Georgia are dedicated supporters of the institutions from which they retired and wish to continue that support in retirement.
- Whereas many retirees continue research, publishing, and presenting in their retirement, and their works bring value and honor to the USG community of scholarship.

Survey and Issues Revealed

- USG institutions are generally willing to consider emeritus faculty as part of the faculty and eligible for full library privileges.
- But survey uncovered uncertainty at institutions about emeritus policies, procedures, and privileges.
- **Consistent provision of library resources and services to emeritus faculty is pivotal.**
- Committee surveyed websites at all USG institutions to uncover what information is available to each campus.

FINDINGS

- All 26 USG institutions have retirees who have been granted emeritus status.
- No emeritus status policy found on web for 8 of 26 institutions.
- Many have out of date statements of BOR policy or references.
- Often difficult to find emeritus policies and procedures.
- Six institutions cover privileges of emeriti in addition to policies and clear procedures. → Best practices.

RECOMMENDATIONS

- USG institutions need to bring emeritus status policies up to date with BOR policy.
- A basic level of procedures and privileges should be stated.
- Ask USG to establish a task force to develop basic guidelines/templates.
 - USG has begun setting up a task force following the Regents Academic Committee: Academic Affairs (RACAA) Meeting on October 3, 2019.
- Include full library privileges including remote access to library resources.
- Emeritus policies, procedures, and privileges should be clearly communicated and accessible from websites dedicated to retirement planning.
- Consider non-emeritus retirees (Hitchhiker's Guide)

HITCHHIKER'S GUIDE

- Lucy Harrison recommended that the Hitchhiker's Guide, being developed by the USGRC Committee on Library Access and Services for Retirees, be finalized. The Committee will follow up
- This "Guide" will describe options for access to library resources for USG non-Emeritus retirees.

OTHER TOPICS DISCUSSED AT LASR MEETING WITH USG ADMINISTRATORS

- The possibility of keeping institutional email addresses, which the Committee recommends should be available to all USG retirees.
- The need for a retiree ID for all retirees at USG institutions.
- Testing an opt-in option (for library access) for USG non-emeritus retirees.
- Regularization of emeritus policies, procedures, and privileges at USG institutions

THREE RESOLUTIONS

Approved by USGRC

- Therefore, be it resolved that three standard library services be provided to all USG retirees who come to a USG library in person. The three services are 1) checkout of library materials (not including equipment), 2) access to electronic resources while in the library, and 3) reference help, including the navigation of any location-specific policies or agreements affecting these and other services;
- Be it further resolved that emeritus faculty at USG institutions be provided full library access (the same as active faculty), including remote access to electronic resources;
- Be it further resolved that, as it relates to the above resolutions, information is kept up to date, as needed, on library and campus websites.

NOTE: To this end, USG, RACL, and USGRC will develop templates to assist campuses to fulfill these recommendations

USGRC Bylaws Review (Cody)

- Team: Tom Abney, Ron Bohlander, Harry Dangel, Missy Cody (chair), Sara Conner, Dennis Marks, Dutchie Riggsby, George Stanton, Dorothy Zinsmeister
- Major changes (see copies for detail)
 - IV.1. Voting Members
 - IV.2. Non-voting Members
 - IV.3. Affiliates
 - IV.1. Officers
 - VI.2. Representatives to Other USG Councils
 - Old VI.6. Removed for redundancy with VI.1.
 - VI.6. Duties
- Passed with asynchronous vote: 22 (yes); 0 (no); 4 (not voting)
- Sent to Chancellor's Office (Karin Elliott and Marti Venn) for review -- So far no objections.

**THE
END**

dreamstime

dreamstime



dreamstime



dreamstime

dreamstime



dreamstime







Extending the Partnership

- **University System of Georgia (USG) and University System of Georgia Retiree Council (USGRC)**
- **USGRC and Campus Retiree Associations**
- **Campus Retiree Associations and Campus Administrations**

Unique Structure of System

- **University System of Georgia—**
currently 26 public colleges and universities across the state of Georgia
- **Board of Regents of the USG—**
governing body for all 26 institutions Sets policy for all institutions



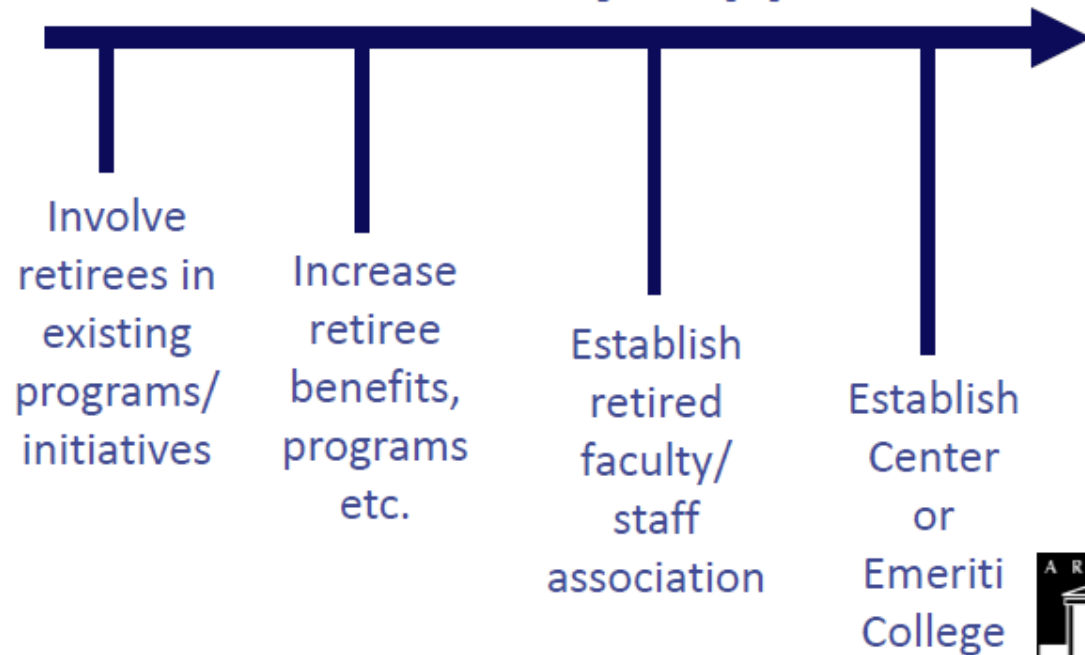
Building a CSU Retiree Organization

- Membership
- Leadership
- Proposed partnerships
- Bylaws
- Activities
- Perquisites
- Name
- Finances



R. O. Characteristics

Continuum of retired staff and faculty support



Retiree Organization Types

Retiree/Emeriti Association	Retiree Center	Emeriti College
<ul style="list-style-type: none">• Unique entity but affiliated with university• Similar to Alumni Associations• Membership-based• Usually primarily dues-funded; sometimes partially campus-supported	<ul style="list-style-type: none">• Office of record for retirees• Usually not membership-based; serves all retirees• Often provide administrative support to retiree associations• Campus-funded	<ul style="list-style-type: none">• Scholarship & research focused• Usually serves retired faculty only• Usually hybrid funding: campus funded, endowment, foundation, membership/fee-based

Primary Functions

	Association	Emeriti College	Center
Connects retired faculty/staff to each other and the campus	X	Faculty only	X
Advocates for retired faculty/staff	X	X	X
Offers educational workshops, scholarly activities	X	X	X
Offers social programs	X	X	X
Facilitates opportunities for teaching, mentoring, service	X	Faculty only	X
Serve as office of record for retirees			X
Coordinates legacy projects	X	X	X
Offers research stipends	X	X	X
Offers retirement preparation classes	X	X	X

University of California

UC emeriti survey



- Conducted every three years
- Includes emeriti from all 10 UC campuses
- 1,619 responses

A VERY powerful document



UC emeriti survey

- 39% taught at UC
- 56% wrote books or articles
- 61% had academic work in progress
- 44% provided other service to UC
- 46% volunteered outside UC



Retiree Organization Survey: USG

- Board or Council - How chosen?
- Additional Board members?
- Representation on Faculty Senate and/or Staff Council?
- Retiree Organization Activities?
- Retiree Organization Facilities?
- Retiree Organization Finances?
- Retiree Perks?
 - Retiree Contributions:
 - Financial?
 - Personal?
- Aspirations?
- Other information?

Retiree Organization Survey: USG

- Responses from 24 of 27 institutions
- Active emeriti/retiree organizations at
 - Clayton State University
 - Georgia State University/Perimeter College
 - Georgia Tech “Silver Jackets”
 - Kennesaw State University “Golden Owls”
 - University of Georgia
 - University of West Georgia
 - Valdosta State University

Overview

- Why now?
 - Changes become catalyst
- Why here?
 - University System of Georgia structure
- Short History
 - AROHE
 - Assoc. of Retiree Organization in Higher Education
 - GA-HERO
 - GA Higher Education Retiree Organizations
 - USGRC
 - Univ. System of Georgia Retiree Council

