Campus Retiree Program Profile

SUNY Upstate Medical University’s “Retiree Associates”

by John C. Farruggio, Human Resources Benefits Manager

Born out of the efforts & vision of the Human Resources Benefits Office and the local UUP Chapter at Upstate Medical University, the “Retiree Associates” initiative was created in 2009. The purpose and focus of the group was based on multiple objectives that included:

1. Providing a means for allowing professional (non-emeritus status) retirees to remain involved with Upstate’s noble mission in the community;
2. Being a viable means to help retirees stay up-to-date on what’s happening on campus; and
3. Supporting retirees’ interest in volunteering their time and expertise

The immediate benefits of enrollment in this well-respected group include:

- **Campus I.D. Cards** – Eligible retirees may obtain a Retiree Associate non-employee I.D. card at any time following retirement. These cards generally entitle retirees to privileges that require possession of an I.D. card, allowing for ease of security access into different buildings such as the hospital, the library, and campus activities.
- **E-mail Access** – Retiree Associates maintain access to SUNY Upstate’s e-mail system through their old GroupWise email account.
- **Library Privileges** – Members retain borrowing library privileges that include remote access to e-mail journals, e-books, and databases.
- **Campus Activities and Upstate Discounts** – Retiree Associates are entitled to use the Campus Activities Building (CAB) exercise/recreational facilities at the same membership fees as active-duty personnel. Additionally, members receive a free OASIS membership and are eligible for a one-time $20.00 gift certificate that can be used towards the processing fee for trimester course registration. OASIS is a unique educational program for mature adults who want to continue to grow, learn and be productive during the best years of their lives. OASIS offers a broad range of stimulating educational classes – from the arts and humanities to wellness, fitness and travel. To learn more about the Syracuse-area OASIS program, which is supported by Upstate Medical University, go to http://www.oasisnet.org/Cities/East/SyracuseNY.aspx.
- **Enrollment in Upstate’s Vitality Fitness Program** – Members have access to the Institute for Human Performance (IHP) facilities for this senior fitness program offered in conjunction with the OASIS program. This is generally a no-cost service, depending on the extent of activities members elect to participate in. For details, visit http://www.upstate.edu/vitality/.
- **SUNY PerksCard Program** – Enables members of the SUNY family, including retirees and their family members, to save money on many of their everyday LOCAL purchases, including: dining, retail, auto services, pet needs, home services, health & beauty, fitness, recreation, travel, entertainment and much more. For additional information, see the “Save Money with SUNY Retiree Discounts” article by Gina Blume on page 15.
- **Receipt of Campus Publications** – Retiree Associates members are included on home mailing lists for various marketing and public affairs materials, allowing them to stay current on campus news and developments.
- **Involvement in Community Service Projects and Fundraising Events** – Retiree Associates are given the opportunity to participate with “Team Upstate” or volunteer with the SUNY Upstate Medical University Foundation or the Advocates for Upstate, which assist Upstate accomplish its goal of community involvement. Such service includes volunteering for events like the “Upstate Open” (annual golf tournament), the annual Community Giving Campaign and various other events, including “Mystery, Malt, & Merlot,” the “Heart Walk,” and the “Tour de Cure.”

Based on the wide variety of benefits that are offered to the members of the Retiree Associates, participation in this group has grown to point that there are now 46 active retirees on campus. What has helped the growth of this initiative is the fact that the Upstate HR Benefits Office meets with all employees before they retire. A big part of the retirement process for professional employees includes a review of the program application and the advantages of enrolling as a “Retiree Associate.” This approach has resulted in 100% participation since the program began! In fact, a few retirees who retired before 2009 called the HR Benefits Office to enroll after hearing about the Retiree Associates initiative.

Our members personify the motto of the Upstate Retiree Associates group: “Life begins at retirement…..”

If you have any questions or would like more information, please contact me at (315) 464-4942 or farruggj@upstate.edu.

Note: There is a related article on the following page...
Upstate Medical University Faculty Retirement Workshop
— What You Should Know

Too often, employees in academia are so focused on their careers and assisting those around them (whether in teaching, research, or patient care) that they lose sight of what they need to do personally in preparation for the retirement phase of their life. Before they realize it 25, 30, or 40 years have passed by and they are unsure how to go about retiring or assuming a new role in the next stage of their career.

On September 10, 2013, Upstate Medical University in Syracuse held a pre-retirement workshop for interested faculty that included a presentation by John Farruggio, Human Resources Benefits Manager; Paula Trief, Ph.D., Senior Associate Dean for Faculty Affairs and Development, and Professor of Psychiatry and Medicine; and a panel discussion by three recent Upstate faculty retirees: Dr. Margaret MacDougall, Emeritus Professor of Medicine, Dr. Michael Ratner, Emeritus Professor of Surgery, and Dr. Gregory Threatte, Emeritus Professor and Chair of Pathology.

The event was attended by approximately 60 Upstate faculty and professional staff who had an opportunity to hear directly from those who could best answer questions about the “nuts and bolts” of the retirement process from a benefits standpoint, some of the challenges of retirement, and learn about what retirement is actually like from those who recently retired.

John Farruggio’s presentation included a comprehensive overview of what the criteria are for retiree health insurance, how important sick leave accruals are to off-setting NYSHIP retiree health insurance premiums, and how Medicare is coordinated with the NYSHIP coverage.

Dr. Trief then presented insights on the emotional and interpersonal challenges that retirees might expect after they are no longer working. She helped them consider how important it is to continue to engage in both physically and intellectually stimulating activities, and reflect on their own needs and those of their family members as they create a gratifying new phase of life.

Finally, the members of the Retiree Panel discussion described the benefits of their “new-found” life as retirees. All noted that retirement “agreed” with them, and that while their schedules had changed, they were still very busy with things they were unable to do when working. Examples included traveling, spending time with family, catching up with things around the house, volunteering, as well as teaching part-time. The recently-retired panel members also emphasized the importance of planning, both financial and personal, to ensure that one’s retirement years are satisfying and fun.

Upstate Medical’s retirement workshop was very well-received by attendees. Some of the post-event survey comments included:

• “Tips on retirement were great!”
• “The retiree panel discussion was truly helpful.”
• “Steps to Retirement’ was the best part.”
• “Helped me better understand my retiree health insurance benefits.”

Additionally, commenters asked Upstate to hold more of this type of presentation, and include information on Social Security/Medicare benefits, information on part-time employment options, as well financial planning and understanding tax implications of retirement.

The primary concept the participants took away from the September workshop is that it is never too early to plan for retirement and that life can be good, and even better, after retirement if one sees this phase less as a “withdrawal” and more as a time of opportunity and growth.

While the workshop was for Upstate Medical University faculty and professional staff considering retirement, the topics covered could easily apply to future retirees from any of SUNY’s 64 campuses. To see a video of the presentation that also includes PowerPoint slides, go to http://amms.upstate.edu/c/facdev/20130910-155505-WH-2231/index.htm.

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Upstate plans to hold similar retirement workshops in 2014.