

AROHE

Transforming Retirement

Association of Retirement Organizations in Higher Education

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December 2016

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President's Notes



Dear Colleagues:

We need a radical reconfiguration of retirement. The public narrative questions the value of higher education and its lack of diversity. The financial and benefit arrangements in higher education are seen as far better than most citizens

have and not reflective of the retirement challenges most citizens face.

Our ultimate goal should be to reassess and redefine the roles of faculty, staff and administrators in such a way that we show value to the public, to society and to governance. We must reconfigure the relationship between the individual and the institution and society at large. AROHE must not become just a benefits advocacy group for retirees.

These challenging words were spoken in the keynote and plenary sessions at the 8th biennial conference. You can read more in the following articles.

When the AROHE board adopted the mantra of transforming retirement, these concerns were much in our minds. We knew that the current retirement paradigm needed disrupting and new models of engagement and service with and for the institution and with society at large are essential to leveraging well the talent and experience of higher education retirees.

To this end, AROHE is not only committed to sharing and developing effective practices for planning and transitioning to retirement or next chapter lives but also advocating for next chapter options that apply the talent, experience and concern of retirees to institution and community needs. In pursuing this mission, we are always interested in your ideas about how this mission can best be achieved.

The 8th biennial conference was the best attended in AROHE's history. Among the registrants, there were 60 academic institutions represented. Read the following article on participant comments about the conference. In 2018, AROHE will hold its biennial conference at Emory University in Atlanta, GA.

For our constituents concerned about the best campus organization system to support their activities, AROHE has developed for members a series of effective practice briefs. There are currently five briefs covering Emeritus Colleges, Retirement Associations, Retiree Centers, Staff

Retirees and the Transition to Retirement, and Legacy Programs. You can read more in the following article. Members can access the briefs through the AROHE Website – www.arohe.org. We welcome your suggestions for future briefs you would find most useful.

As usual, this newsletter also highlights several other important developments with relevance for retirees. This includes a report on a 2016 survey of the operation and benefits of retirement organizations in higher education.

This is my last column as AROHE President. It has been an honor to serve you and our mission of transforming retirement. Our new President, Caroline Kane, looks forward to continuing and enhancing our collaboration and service with and for our valued higher education retirees.

Happy Holidays and best wishes for a healthy and prosperous 2017. Be well.

Patrick Cullinane, MS

President, AROHE

**AROHE Conference, Seattle Washington, August 2016, Keynote Speaker Notes:
"Transforming Retirement, The Big Picture: What's Coming and Why"**



The day 1 keynote speaker was **Fernando Torres-Gil**, Professor of Social Welfare and Public Policy at the Center for Policy Research on Aging, University of California, Los Angeles. Here are some notes from his talk.

In looking at the "Big Picture", demographic changes as well as changing notions about the role of Higher Education must influence how we work with retirees and pre-retirees. Faculty, staff, and administrators need to be aware that the public, (eg., taxpayers, politicians, and pundits) is questioning the value of Higher Education and its lack of diversity. At the same time they are struggling with the concept that aging baby boomers are working longer (with the background noise being that they are keeping jobs from younger professionals who need to begin their careers) and living longer (thereby taking up social security funds and putting a strain on medical care).

Higher Education must face these as an opportunity to create a road map for future contributions than can be made in pre- and post-retirement. We need a career trajectory relevant to our challenges and contributions, one that might involve multiple roles including civic and government leadership, or scholarship and research.

Public institutions face fiscal pressures and public resistance. Private institutions face competition and market volatility. Families and students face high debt, disillusionment, and employment insecurity. These problems inform current policy challenges. The next Presidential Administration must grapple with entitlement reforms, budgetary pressures, the shifting role of government and the role of seniors in voting and politics. Older voters are still primarily White, English speaking, and vote more than young and diverse groups.

The politics of aging baby boomers and entitlement programs such as social security revolve around debates about resource allocation. The recent White House Conference on Aging brought to light challenges and opportunities for the aging population. The challenge is to find meaningful roles, innovative models, administrative incentives, and pre- and post-retirement best practices in the form of avenues for stepping down, phasing out, sabbaticals and new forms of tenure. For universities, these avenues must take into consideration the need for Higher Education to maintain pensions and retirement security while addressing the psychosocial needs of its retirees. The tension between older, established faculty and staff, and the younger, more diverse faculty/staff can create options for retirees to continue to be of service and to give back.

And assuming we live to be 100 years of age, how do we plan for: Financial security; Social support; Vicissitudes of aging (e.g. chronic conditions); Aging in place vs. in livable communities (e.g., long-term care)? Our ultimate goal should be to reassess and redefine the role of faculty, staff, and administrators in such a way that we show value to the public, to society and to

governance. We must seek out flexibility, opportunity and options to enjoy longevity in Higher Education, re-socialize pre-retirees at a younger point in their careers about their eventual retirement, and plan for post-retirement that continues our contributions to society, becoming a feedback loop where entering faculty, staff, and administrators begin their retirement planning at the very beginning of their careers.

Thus, we are left with the following questions: What relevance does this “Big Picture” and broad context have in transforming retirement? How might we re-think career transitions, campus engagement, encore initiatives, and the value of retirees in both on and off-campus partnerships? Is there room in our immediate concerns for incorporating broader contributions of retirees to society (e.g., advocacy for students, minorities, young faculty and staff)? And finally, should we incorporate a “personal longevity plan” in our institution’s pre-retirement planning and what should that look like?

**AROHE Conference, Seattle Washington, August 2016, Keynote Speaker Notes:
"Colleges and Universities as Models, Facilitators, and Champions of Transformed Retirement"**

The day 2, speaker was **Carole Goldberg**, Vice Chancellor for Academic Personnel, Emerita, and **Jonathan D. Varat**, Distinguished Professor of Law, UCLA. Below are notes from her talk.



Higher Education challenges include the reduction in state funding, tuition pressures, growing undergraduate student enrollment, limited opportunities in Academia for Ph.D.'s and the need to improve diversity among professoriate and staff, plus growing regulatory and compliance demands. At the same time, colleges and universities are dealing with a large professoriate of baby boomers who are tenured, enjoy improved health and face no mandatory retirement. By rethinking faculty/staff retirement, universities can open positions to an increasingly diverse population of university graduates and upcoming Ph.D.'s, while retaining the talent, contributions and institutional knowledge of longtime faculty and employees who wish to remain engaged. This longtime employee population can provide a resource for dealing with the problems with which Higher Education is faced.

In order to rethink retirement, it is important to acknowledge reasons for the reluctance to retire of the current professoriate. They share financial concerns, concerns about loss of identity, the loss of resources to continue their work, and a diminished commitment to various sub-disciplines. For these reasons, **retirement needs a radical re-conception**. It should not be thought of as a severance of the relationship between the individual and the institution, but rather as a **reconfiguration of that relationship**. To accomplish this goal, higher education needs a new vision of the university's role in retirement. The old role meant financial counseling and some post-retirement programming, but the new roll needs to focus on educating faculty/staff about the potential value of retirement, providing real incentives for retirement, both before and after, providing recognition for the contributions of emeriti and retirees, and creating real opportunities for faculty/staff to find fulfillment through future contributions to the university.

To this end, UCLA recently created a **Faculty Retirement Liaison position**. This position advises and advocates for faculty who are considering retirement, as well as for those who have already retired. For those considering retirement, this position helps faculty plan for, structure and negotiate pre- and post-retirement arrangements with their departments. The position supports an important campus initiative to assist faculty in making continuing contributions to UCLA. The initiative will hopefully serve as a model in forging a new path for retirement and includes a series of workshops for faculty on planning for retirement while still maintaining active professorial engagement in emeriti status. The first workshop involves navigating this dual retirement process in which the Faculty Retirement Liaison discusses how to ensure a successful transition to the emeriti years by crafting and negotiating with department chairs a clear understanding of the conditions under which retirement will occur. The second workshop explores continuing professional involvement after retirement. Faculty from various disciplines share experiences and answer questions about continuing research and scholarly involvement and service after retirement. The third workshop focuses on the mechanics of the UC retirement process and how to maximize benefits. The workshop series includes Pathways Agreements, allowing the university and faculty to plan ahead regarding a working title, office space policy, endowed chair policy and discounts for such things as parking, bookstore purchases, etc. Recognition strategies include receptions at the Chancellor's House, displays of emeriti art, and awards for scholarship, teaching and post-retirement service.

Strategies to fulfill opportunities to contribute may include recalls for teaching, research and service, the Emericorp Mentoring Program for Associate Professors, inclusion in Senate and administrative leadership roles, and work with programs such as campus retirement centers, emeriti associations and/or Encore.org. Such initiatives will hopefully be extended to staff as well, but certain challenges still need to be met. For instance, compliance obligations and liability issues need to be addressed in order to define the university's relationship to retired faculty/staff volunteers. Expanded post-retirement services to connect the campus and community to retirees and emeriti need to be developed, and greater recognition for the value provided by retirees needs to be established. This provides a relevant way to address "the need to do more with less" by utilizing the talents of those who are already here.

Opportunity Knocking

By: Roger Baldwin & Brett Say, Michigan State University

Our spring 2016 national survey on the operations and benefits of retirement organizations in higher education (ROs) revealed interesting implications for these organization ranging from membership generation to assessment.

Membership: While most ROs include some combination of faculty, staff, and their partners or spouses, less than half offer membership to faculty and staff nearing retirement or retirees from other higher education institutions in the area. Exploring new sources of membership can help increase participation.

Revenue: Most respondents indicated their RO relies heavily on membership dues and/or subsidies from a particular office at their institution. Few cited other forms of income such as their institution's general fund, fund-raising campaigns, endowments, or grants. This finding suggests ROs should consider a more diverse range of funding sources.

Mission and Benefits: 90% of respondents cited maintaining retirees' connections with their institutions and colleagues as key benefits of ROs. About 70% also cited service to their institution as important. Far fewer mentioned assisting senior colleagues with their transition into retirement, supporting current faculty with teaching or research, or mentoring students and junior colleagues as key RO benefits. Seeking to broaden their mission, programs, and services may make ROs attractive to a wider range of emeriti/retirees

Challenges: The most common RO challenges were visibility of the organization and maintaining membership. ROs need to communicate creatively and frequently with key stakeholders concerning their services, activities, and achievements in support of long-term sustainability.

Assessment: Fewer than 10% of ROs indicated they collect assessment data directly from retirees. Most monitor program performance only informally, not an effective way to improve performance or generate compelling evidence of value. Regular assessment can help an RO better serve its members and more effectively advocate for support.

Transforming retirement, a major AROHE goal, will require many ROs to reconsider their organization's purpose and scope, and, ideally, capitalize on the promising opportunities our survey revealed. Preliminary survey findings are available at: <http://chae.msu.edu/people/roger-baldwin>.

Member Success Story: University of Cincinnati's (UC) Emeriti Center

By: Carl Huether

The UC Office of the Provost approved a proposal earlier this year for the creation an Emeriti Center, which will provide retired faculty with continued intellectual stimulation and social interactions, while retaining a relationship with the university. And, to further the valuable relationship between the UC and its emeriti professors, their Office of the Provost recently also supported the hiring of Professor Emerita Patricia Mezinskis as the interim executive director of the new UC Emeriti Center.



“It is so important that we bolster our relationship with the talented emeriti who continue to make contributions to further the success of our university and positively impact our city,” said UC Interim Provost Peter Landgren.

Carl Huether, president of the UC Emeriti Association and AROHE Member, enthusiastically notes, “Our success in this can be directly related to our being mentored by AROHE, our learning of Emeritus Colleges, our being directed to the Emory Emeritus College, and their enthusing considerable support. It is very clear to me that without AROHE’s help and involvement, we would not have an Emeriti Center here today.”

With this assistance, the UC [Emeriti Association's](#) activity participation significantly increased. These activities include an annual Recognition and Appreciation Dinner, Undergraduate Mentorship Program, Luncheon Speakers Series, improving benefits for emeriti, and more. The UC Emeriti Center’s mission is to continue, improve and develop these events to benefit the university, as well as the emeriti.

Carl states that involvement with AROHE enabled them to make the case that “providing a place to which faculty can retire that includes increased opportunity for scholarly engagement, intellectual enrichment, camaraderie, and maintenance of professional identity, helps promote a culture that values the emeriti’s contributions to the UC community”.

We Are Pleased to Announce: THE AROHE BRIEFS

As part of AROHE’s mission to transform retirement, this ongoing series describes (in an easy-to-read format) effective programs and practices that support retiree organizations as well as individual faculty and staff retirees. All the Briefs include handy references to the websites of specific institutions and to print documents as appropriate.

One set of Briefs identifies the key characteristics of three types of retiree association for those planning to establish new associations or for those wishing to enhance their association’s programs:

- 1. The Retiree Association**
- 2. The Retiree Center**
- 3. The Emeritus College**

Those starting a new association will also wish to consult the [AROHE Start-Up Guide](#). We have also produced a [Brief focused specifically on Staff Transitions](#) for those wanting to learn more about supporting senior and retiring staff members.

Our latest Brief on Legacy Projects describes efforts to ensure that contributions by faculty and staff to the institution and the community are both recognized and remembered.

Briefs currently in progress include one on Faculty Transitions and one on Pre-retirement Programs.

You can contribute to this project in four ways:

1. If your institution provides a good example of any of the practices identified in our Briefs, please let us know, so that we can showcase your institution by adding it to our references.
2. If your institution has established a program or practice that you would like to share with the AROHE membership, please describe it to us.
3. If you would like to see a Brief on a particular topic, please inform us.
4. If you would like to contribute a Brief to our series, please send us details of your proposal.

The *Briefs*, the *AROHE Start-Up Guide*, and additional information about programs for college and university retirees are available on the AROHE website at <http://www.arohe.org/>

2016 AROHE Conference Evaluations / 2018 Conference Location Selected

The AROHE conference in August was highly successful and comments from the attendees indicated they thoroughly enjoyed the beautiful setting, a well-run conference and many opportunities to do networking. Both new attendees and well-seasoned ones enjoyed the keynote speakers and the assortment of workshops. Evaluations ran high in all areas with recommendations for starting earlier in the day on the first day of the conference in ending earlier on the last day of the conference so that people can fly home in a timely manner. Providing more content for new members was suggested along with including a workshop for staff retirees.

Conference attendees are encouraged to go to the AROHE website to access the white papers and other important resources provided by the conference presenters.



The 2018 fall conference is slated to occur at [Emory University](http://www.emory.edu), a top-ranked private institution recognized internationally for its outstanding liberal arts colleges, graduate and professional schools and one of the world's leading health care systems. Emory is located on a beautiful campus in Atlanta, Georgia's historic Druid Hills neighborhood. We hope that many of you will provide recommendations for the content and agenda and welcome your ideas to be emailed to info@arohe.org.

AROHE Member Success Story: If, At First You Don't Succeed, Examine Your Premise and Begin Anew

By: Pierce Mullen, Professor Emeritus, History, Montana State University



Here at Montana State University (MSU) in Bozeman newly retired faculty and staff are likely to think first of elk hunting season, whether to buy season ski tickets or just weekdays or planning to skip winter and head South. A dozen years ago a newly retired physicist, **Bob Swenson**, returned from Phoenix excited by what he had learned at Arizona State about their Emeritus College. Like Paul on the road to Tarsus, Bob was electrified by the idea that MSU should found an emeritus college. As a former Vice President for Research he wanted a proper college with a decent budget, line item administrator and a slate of committees, courses and privileges.

Finding a trophy bull elk would have been a lot easier. Retirees backed the idea and founded The Association of Retired Faculty, with a proper newsletter, *The Bow Wow Times*. Fun, clever and funded solely by faculty dues and a Provost's grant for a small space to meet and some new furniture. First one, and then the succeeding President balked at the idea of a college and associated costs. **Bob saw the benefit of joining AROHE when it was founded.** MSU was one of the few smaller universities to take advantage of this new organization's huge base of information on the care and feeding of this avalanche of retirees in higher education.

ARF debated the issue of college or faculty/staff retiree group but deference for Bob, especially during his extended and painful illness muted the issue. He passed away just before Christmas and we honor him as our founding father. This spring and summer ARF dissolved and under the umbrella of the MSU Foundation and Alumni Association and with active support from the Provost, a new MSU Retirees Association takes form. As every retired faculty member knows, staff retirees have talents much in demand by dynamic organizations: they know how to cut red tape, fix things and keep ideas simple. Recruitment is now underway for both elements in this new organization. Maybe, because fly fishing is so important here, our newsletter ought to be called *The Compleat Angler*---we would like to catch you!

Enough of that. We are grateful for all the good ideas and wonderful trove of useful information that AROHE makes available. Our active and very far from retirement Alumni Association director, Michelle Laxson, provides timelines, logistic support, and ensures that our work proceeds efficiently. One of the absolutely critical functions our members demand is up to date information on Medicare supplemental plans and changes in associated pharmacy formularies. General health insurance information had remained one of the specialized areas of knowledge our members possess and share.

The dream of active intellectual involvement has been realized both within MSU and in the larger community's Wonderlust town/gown courses, special topics and lectures. We have the great

good fortune to live in a beautiful area with mentally active, interested and dynamic individuals who retire with goodwill and satisfaction. AROHE can assist your institution to follow this star too if only you ask.

It just takes a few of active emerita and emeriti joined, if that is your model, with interested staff to get your organization airborne. It is better to light one candle than to curse the darkness.
AROHE is here to keep the flame hot.

AROHE and Members Featured in The Chronicle of Higher Education

The CHE has recently published articles that include quotes from AROHE board members and highlighted programs at AROHE institutions regarding retirement. Here are a two of these:

[Greasing the Retirement Wheel - The Chronicle of Higher Education Nov 27, 2016](#)

[7 Ways to Ease the Transition to Retirement - The Chronicle of Higher Education Nov 27, 2016 Emeriti Center](#)

Congratulations to the 2017 – 2018 AROHE Board of Directors

The following were elected by AROHE voting representatives:

- President, Caroline Kane (UC Berkeley)
- President-elect, vacant
- Secretary, Lucy Eubanks (Clemson University)
- Treasurer, David Stumpf (Northwestern University)
- Past-president, Patrick Cullinane (UC Berkeley)

Members-at-large:

- Gray Crouse, (Emory University)
- Lynn Dull, (Washington University)
- Fancy Funk, (Florida State University)
- Carl Huether, (University of Cincinnati)
- Michelle Laxson, (Montana State University)
- Linda Pearson, (Ivy Tech Community College)
- Claire Van Ummersen, (American Council on Education)
- Kent Weaver, (University of Toronto)
- Cherie Hamilton, (University of Minnesota)
- Jessica Kauphusman, (Winona State University)
- Ray Ortali (Rutgers University)

[Click here to see more details about each person.](#)

The new board term begins on January 1, 2017. Board members will attend a retreat in Atlanta in late January to review priorities and set goals for the next two years.

Go4Life®

Go4Life®—the exercise and physical activity campaign from the National Institute on Aging at NIH This year's focus is **#Fit4Function**. Be physically active in 2017 so you can continue doing the everyday activities you enjoy. See what you or your organization can do!

[See how to get involved in **Go4Life Month**.](#) (VIDEO)

[See why regular exercise is one of the healthiest things you can do.](#)

Information on [Exercise: Health Benefits](#) is provided by [NIHSeniorHealth](#) and developed by the [National Institute on Aging \(NIA\)](#) at NIH.

\$1 Million ACL Grant to Create a New National Center on Law and Elder Rights

ACL's Administration on Aging announced the release of \$1,050,000 to the nationally recognized senior advocacy organization Justice in Aging to create a new National Center on Law and Elder Rights (NCLER).

The NCLER will support ACL's ongoing efforts to protect the rights, financial security, and independence of older adults. The Center will provide tools to help law and aging professionals serve older clients and consumers effectively and serve as an easy single point of entry to a

comprehensive system of legal resource support. For more information about the NCLER, please contact Omar Valverde at [202-795-7460](tel:202-795-7460) or omar.valverde@aoa.hhs.gov.

Major Family Caregiving Report Released

The need for family caregivers in the U.S. is rapidly increasing, yet demographic shifts are causing the pool of potential family caregivers to decrease, according to "[Families Caring for an Aging America](#)," a new highly anticipated report from The National Academies of Sciences, Engineering, and Medicine. Currently, nearly 18 million people in this country provide some form of care for loved ones age 65 or older. The report calls for retooling the health care delivery system through practice and policy change to more appropriately recognize and support the integral role of family caregivers.

Stay tuned for the October issue of *Gerontology News* for more coverage of GSA's role in the report's dissemination.

AROHE Services and Programs

AROHE provides a variety of services to its members and member organizations. For members who are forming new retiree organizations or developing new programs for retired faculty and staff, AROHE offers the following resources, in addition to a Start Up Kit, geared toward newly-established groups. Membership benefits include:

- **A Biennial Conference** is AROHE's most significant undertaking. It brings retiree organization leaders from across North America together for two full days of workshops, forums and networking opportunities.
- **AROHE Matters** is an electronic newsletter that is sent every other month to AROHE members and non-members. **Please SHARE this resources with your members.** The newsletter includes such items as links to useful resources, descriptions of successful practices, results of surveys and profiles of AROHE members.
- **The AROHE website featuring:**
 - **An online member directory** allowing members to search for and seek assistance from other member organizations that will be most aligned with their needs.
 - **An online discussion forum** for members to share ideas or to ask question of other members.
 - **Member-shared resources** in these topical areas: programs and events, awards and recognition, fundraising and scholarships, volunteers and service, communications and marketing, surveys and reports, organization management and pre-retirement programs.
- **A new mentoring program** which pairs new or less-experienced members with more experienced members for one-on-one consultation.

Join us. We invite your input. Share your ideas, needs, and concerns by emailing info@arohe.org. Join AROHE and help transform retirement in higher education.

About AROHE

AROHE's mantra is "Transforming Retirement"

AROHE is a nonprofit association that champions transformative practices to support all stages of faculty and staff retirement, their mutually beneficial engagement and continuing contributions to their academic institutions. By sharing research, innovative ideas and successful practices, AROHE emphasizes the development and enhancement of campus-based retiree organizations and programs which support this continuing engagement in higher education.

Paid organizational memberships allow member benefits for up to eight people per organization and start at just \$120 per year for retiree organizations with annual budgets under \$50,000. Individual memberships are available for \$60/year.

Learn more at <http://arohe.org> or contact us by calling 213-740-5037 or sending an email to info@arohe.org.

AROHE Board Members are volunteers who are leaders from associations of retired faculty and staff, administrators of campus-based retiree centers or emeriti colleges or other campus department administrators who oversee programs for academic retirees.

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Contact email: info@arohe.org

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