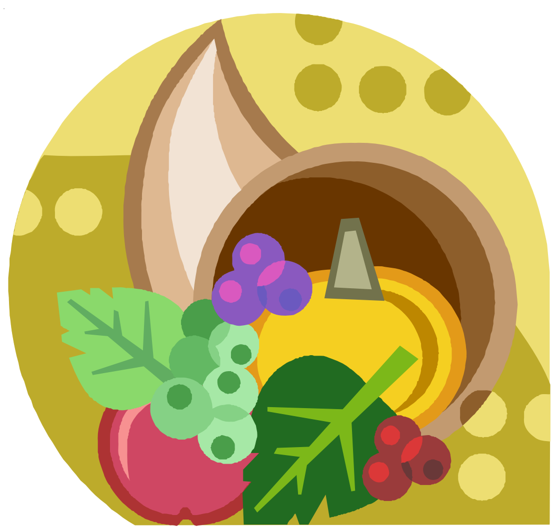
The Next Chapter

Association of Retirement Organizations in Higher Education (AROHE)



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FROM THE EXECUTIVE DIRECTOR

PROVIDING VALUE TO OUR MEMBERS

Do you wonder what other educational institutions are doing to support, serve, advocate for, engage, utilize, and honor their retired faculty and staff? Which colleges and universities have retiree organizations or associations on campus? Do the organizations serve retired faculty and staff? How are the organizations configured and supported? What are their best practices, major accomplishments, and greatest challenges?

Please help us help you and demonstrate AROHE's leadership and cutting-edge research by helping us inform others about retirement issues in higher education. You can do this by filling out the "**AROHE Survey of COLLEGE and UNIVERSITY Retiree Organizations"** on the AROHE web site.

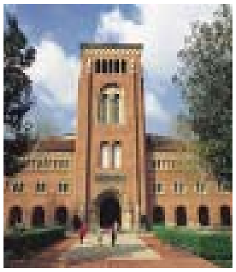
Send all of your colleagues across the country and abroad to: www.arohe.org and click on the AROHE Survey link.

Please complete a survey **for each** retiree organization & unit affiliated with your institution. ***The person or university with the most referrals will receive a free 2008 AROHE membership***. *(This information is collected in the last question of the survey. Survey completion deadline: February 14, 2008).*

RESEARCH RESULTS will be published and presented at the AROHE Conference - October 24-26, 2008 in Los Angeles.

~Janette C. Brown, Ed.D
USC

AROHE Conference October 24-26, 2008



"Retiree Organizations in Higher Education: Values and Opportunities"

at the

University of Southern California

Los Angeles

SAVE THE DATE!

The AROHE Conference on **October 24-26, 2008***, will be hosted by the University of Southern California (USC) in Los Angeles, California in conjunction with the USC Emeriti Center's 30th Anniversary Celebration. Although we wanted our next conference in the East, the support from USC made for an optimum AROHE opportunity. We are delighted to announce that our 2010 AROHE Conference will be located at Wesleyan University in Connecticut.*

WHY ATTEND?

HEAR NATIONAL EXPERTS speak to issues of critical importance to retirement in higher education and learn about the results of the **AROHE International Survey of Retiree Organizations.**

SHARE best practices, creative solutions, and issues with other retirement organizations and those planning new ones.

LEARN HOW your campus can benefit by having a retirement organization, provide value to your institution, and keep organizations relevant for present and future retirees.

BE ENERGIZED by your peers and colleagues who are actively engaged in new retirement ventures.

DEVELOP new funding, organizing, financing, and advocacy strategies.

EXPAND possibilities for collaborations and regional networks.

CONNECT with organizations and companies that have products and services beneficial to your members.

CALL FOR PRESENTATIONS

Deadline: March 28, 2008

AROHE's biennial conference brings together AROHE member organizations, university administrators, and others from colleges and universities across the United States and Canada to explore trends and models of retirement in higher education.

We are seeking members of retiree organizations, those interested in organizing a retiree group, retired faculty and staff, institution administrators, and others who can provide experience, insight, research, and information of interest to retirees, pre-retirees, higher education institutions, and others that serve these populations.

We encourage a variety of presentation types including those that are of a practical "how to nature," focused on timely issues, describe innovative and successful practices, or present relevant inquiry and research.

To fill out the Presentation form, go to:

http://www.arohe.org/conferences.shtml

AROHE 2008 Conference Co-Chairs:
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EMERITUS OR NOT? THAT IS THE QUESTION

In ancient Rome, "Emeritus" referred to soldiers or sailors who had routinely completed their service and been discharged and considered to have been experienced and skilled. Its early use in English was similar. The earliest example of that meaning in the Oxford English Dictionary is from 1664: "Emerited and well-deserving Seamen and Mariners." However, that was preceded by what OED terms a contemptuous usage in 1641: "That old Emerit thing...that rotten antiquary." It seems that old age has not always been venerated. The first use of the term Emeritus Professor in OED is from 1823. In current usage, the term "Emeritus" or "Emerita" commonly means that an individual has retired from his or her career position. "Professor Emeritus" does not necessarily denote that a person was unusually distinguished but rather that he once was a professor and is now retired.

Recently, one of our AROHE members was curious as to how this title was bestowed or attained at various institutions. The answers were as different as each respective institution. No surprise.

Following are a few examples how this entitlement is dealt with at some of our member institutions.

Indiana University: Emeritus status is conferred upon tenured faculty members through a process that begins with the recommendation of the Department Chair and concludes with ACCEPTANCE by the Board of Trustees.

University of Denver: Emeritus status is proposed by the Department Chair and must be approved by the Provost's office. Approximately 60-70% of retiring professors receive the emeritus status.

Yale University: It is automatic and a reward for service.

Clemson University: Regular faculty members who have served at least five years at the university and fifteen years in the academic profession receive the title of Emeritus or Emerita appended to their professorial rank upon official retirement.

In 2000, the AAUP Committee on Retirement co-sponsored a survey on faculty retirement programs with TIAA-CREF and others. In almost 85% of the institutions, faculty members who retire are eligible to have the title Emeritus professor conferred upon them. At some institutions, this is fairly routine, while other institutions have a process in place for conferral of the title.

While some stated that it is honorific, others stated it is not an accolade to receive the title but a fact of "retirement achieved". A goal we all can agree upon at some point in our lives!

~Eddie Murphy
UCLA

AROHE BOARD MEETING SEPTEMBER 28, 2007

Working hard for you are:

Front Row: L-R Janette Brown, Mitzi Tsujitmoto, Eddie Murphy and Gloria Reyes

Second Row: L-R Bill Wasch, Bob Stallings, Len Gordon, Shelley Glazer and Betty Redmon

SPOTLIGHT ON UNIVERSITY OF WASHINGTON RETIREMENT ASSOCIATION

Year organized: 1975; incorporated as a non-profit organization, 501(c)(3)

Current membership: approximately 1450 households, or 2000+ individuals

Eligible members:

- Retired faculty and staff of the University of Washington (UW)
- Current salaried (career) faculty and staff of the UW
- Retirees of other accredited higher education institutions

Annual dues: $40 per retiree household; $30 per pre-retiree household

Staff: Two UW staff, shared with the UW Retirement Center and supported partly by UW and partly by UWRA

Office: UW Seattle campus space, computer support, phone, long-distance and some other office infrastructure provided by UW

Contact:

UWRA
Box 351277
University of Washington
Seattle WA 98195-1277
206-543-8600 Phone
206-685-1719 FAX
retiremt@u.washington.edu
http://depts.washington.edu/retiremt/uwra

Executive Director:

Pat Dougherty
patd@u.washington.edu

INTRODUCTION

The University of Washington Retirement Association (UWRA) was organized in 1975 by employees and retired faculty, staff and spouses, following years of ultimately successful lobbying to secure better pension packages for state higher education employees.

STAFFING

The UWRA has a long-established arrangement of strong infrastructure and staffing support from the University of Washington (see sidebar). Pat Dougherty is the fifth and current Executive Director of the University of Washington Retirement Association (UWRA), reporting to its Board of Directors. This appointment also carries the title of Director of the UW Retirement Center, responsible to the UW's Office of the Provost. The Director consults with the Provost's office and acts at the direction of the UWRA board to develop and implement programming directed toward UW's prospective and current retirees. The Director maintains administrative relationships with campus offices and outside affinity groups and organizations. Office operations are overseen by the Director and run by a second full-time employee, Adriane Coblentz, Program Operations Specialist. Both receive UW salaries and benefits, a percentage of which are reimbursed to the UW by the UWRA. The office and programs are also supported by UWRA member volunteers.

MEMBER PROGRAMMING AND RECRUITMENT CHALLENGES

UWRA is now 32 years old. The first generation of members is beginning to pass away. Although new members are always cultivated, increasingly UWRA must develop membership among the next generation of retirees.

A mature retirement association has an active membership with an age range of 30 years or more. Although our society tends to lump "retirees" together, at no other time in life are people across such a wide age span expected to have common interests and concerns. Mature retirement associations may have a membership that touches at least two generations, each with its own views about life and about retirement.

This situation presents challenges for programming. The baby boomers, with their tendency not to be "joiners," also present challenges for membership recruitment.

REVIEW—TOWARD RENEWAL AND RE-VITALIZATION

In 2005 the UWRA Board of Directors embarked on an 18-month review of UWRA programs, services and communications in order to renew and revitalize the association. The board asked:

- Are our programs relevant to our current members?
- Are we reaching a range of members through our services?
- What do members value about UWRA?
- What inhibits member participation?
- What possible future programs and services might better anticipate and meet member needs?
- Is our communication effective? How can we update it for the 21st century?

DATA COLLECTION

UWRA collected data from and about members. A survey published in the quarterly newsletter asked members to indicate their

- interest and actual participation in current programs and services
- reasons for not participating in current programs and services
- interest and possible participation in specific examples of future programs and services
- ideas of their own for future programs and services

A second survey, the Member Interests Survey, was sent with member renewal notices. Each individual was asked

- what interests (cultural, civic, active, etc.) they pursue
- whether they are interested in pursuing these with UWRA
- if they are willing to help plan programming for those topic areas

DATA COLLECTION RESULTS

The program participation survey yielded significant information. As expected, mobility and transportation are challenges that increase with age. Transportation is more difficult away from the home area or when driving at night. Increasing age can also bring limits to personal mobility and access.

A favorite among UWRA programs is the quarterly membership meeting, at which folks can easily combine access, social time and intellectual stimulation. Programs that meet these multiple needs are popular.

Among younger retirees, UWRA competes with other events and activities for members' attention. Many more retiree-related events are offered today than when UWRA was first organized.

COMMUNICATIONS

The other great member favorite is the group email digest. At least weekly, group emails go out to members. Content includes informational updates, impromptu events and UW and community resources. The majority of member households use email.

Still, UWRA needs to update website and email communications. A review by the communications committee underscores the need for a technology facelift. However, regular mailings will continue. A significant minority of members do not use the computer comfortably or at all. And paper reminders continue to serve a valuable purpose for all members.

PROGRAM REVIEW

An ad-hoc committee was formed to review current UWRA programs. This group drew on the collected member demographic data (geographic and age-related), member feedback and interest surveys. It also developed evaluative criteria for program review, emphasizing the health of the association based membership growth, involvement and retention, service to a wide range of members and programs that give the most return for effort.

The following criteria, endorsed by the board of directors, form an ongoing basis for evaluating current programs and developing new ones.

- Programs should be designed to fit within the mission of UWRA.
- Convenience and ease of member access to events are important. The UW Seattle campus is a familiar setting that overcomes barriers for some and should be considered as a regular program site.
- Programs that tie closely to the UW and its resources are valued by members.
- Quarterly membership meetings have strong member interest and participation and should be recognized as the cornerstone of programming.
- When possible, UWRA should link members with activities offered by outside organizations, rather than trying to cover an equivalent range of topics and events in UWRA programming.
- While programs should focus in the Puget Sound region, UWRA needs to assist members who live outside the Puget Sound area to connect with other retirement associations.
- Programs should be cost-effective in terms of staff and volunteer time expended in relation to member gain or participation
- Programs on transitions to and within retirement are of interest and represent an ongoing primary purpose for service by UWRA.
- Programs should promote UWRA as active, involved, offering social benefits, valuable information and other services to and beyond the membership.

The board also noted that program planning needs to acknowledge member diversity other than age, including singles, sexual minorities, ethnic minorities and those with lifelong disabilities or financial limitations.

SERVICE FOCUS: RETIREMENT TRANSITIONS

During the review new programs were offered on a trial basis and evaluated by participants. Two seminars on retirement transitions offered particular promise. The first, for “pre-retirees,” summarized topics to consider when preparing for retirement. The second, for retirees, looked at housing options. Evaluations indicated that all participants were anxious for more in-depth information, but pre-retirees want concentrated information, lots of handouts and web links. Retirees want information and time to discuss and compare notes with one another.

Retirement transition programs also need to include information relevant to modest-income employees and retirees and to offer resources to frailer members to help keep them connected.

Overall the board found that “retirement transitions” is worthy of primary attention as a service program and natural niche for UWRA on the campus.

UWRA CONNECTIONS BEYOND THE CAMPUS

Beyond direct membership service, UWRA recognized the need to

- further develop service, visibility and presence in relationship with UW
- further develop connections with the residents and staff of University Houses (UWRA-affiliated retirement communities) and, the communities’ management firm as opportunities for advocacy
- recognize UWRA’s regional and national affiliations with other retirement associations as opportunities for mutual support, inspiration, community and collective advocacy

IMPLEMENTATION AND NEXT STEPS

In Fall 2008 UWRA will begin to implement programming based on these findings. The next challenge is to look at committee structures to find effective ways to involve busy members in program development related to their indicated interest areas. With an expanded and more visible range of programs in place, UWRA will be in a strong position to conduct a focused member campaign with broad appeal.

~Pat Dougherty, Executive Director
University of Washington Retirement Association