# AROFE Associations of Retirement Organizations in Higher Education

SEPTEMBER 2010

## PURPOSE and PASSION in RETIREMENT

AS BARRY CULHANE, President of AROHE, puts it, "Purpose and Passion in Retirement, (the theme of the upcoming October 2010 Conference in Connecticut) highlights that retirement is more of a transition than an end point. All retirees in higher education should have the opportunity to embrace retirement with a passion and a zest for change and a resolve to continue to pursue their dreams – academic or otherwise."

Over and again we have abhorred this term "retirement". The dictionary has two very cheerless definitions. The first is "removal or withdrawal from service, office, or business". The second is "withdrawal into privacy or seclusion".

The reality is that SO many are using retirement years to pursue a purpose, a passion, or a dream. They want to be engaged intellectually, give back, and enhance meaning in their own lives in a way that they may not have been able to do during their full-time career days.

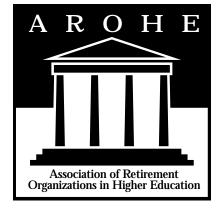
According to a poll by Princeton Survey Research Associates, half of Americans ages 50 to 70 want to find work that has social impact after their primary career ends. Between 5.3 million and 8.4 million Americans ages 44 to 70 have already launched "encore careers," positions that combine income with personal meaning and social good. The former retirement 'ideal' was the freedom from work. The new, purpose-focused dream is the freedom to

work at something which one chooses!

At the conference, October 14th - 17th, you will meet with those who demonstrate their purpose and passion in retirement, those who support retiree organizations and/or challenge traditional thinking about 'retirement'. Our speakers are creative and talented retirees as well as professionals from academe and business addressing issues from personal, practical, and academic perspectives.

On Friday night, there is a special trip to YALE with reception (for the first 60 interested registrants) or an optional free dinner and tour of COVENANT VILLAGE OF CROMWELL. Optional trips to view a custom designed modified home for aging in place and an opportunity to tour MARKTWAIN and HARRIET BEECHER STOWE'S homes or take a river cruise are all available.

With something for everyone including special panels of experienced professionals we will explore best practices in volunteerism and service, senior housing, organizational models and strategies, retirement transitions, wellness initiatives, lifelong learning, learning from the great masters of art, and tapping into your own purpose in retirement. Throughout the conference, we have designed time for networking with like-minded individuals during receptions, as well as during breakfast, lunch, and dinner.



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**SOON WE WILL** gather at Wesleyan University for the October 14-17, 2010 AROHE Conference. I was so very pleased when Dr. Robert Butler, the Pulitzer Prize winning President and CEO of the International Longevity Center, agreed to be our keynote speaker. We were deeply saddened to learn of his unexpected death July 5th. We will have a special remembrance of Dr. Butler on display at the conference and will have several copies of his books available for sale at the conference.

We were especially delighted when Professor Becca Levy, PhD, Associate Professor of Epidemiology (Chronic Diseases) and of Psychology from the Yale School of Public Health, accepted our invitation to highlight our conference by delivering the keynote address. Professor Levy will bring a wonderful perspective regarding psychosocial influences on aging.

#### **WHY ATTEND?**

Our conference is a great opportunity to learn about trends in retiree organizations in higher education, exchange ideas, and network with colleagues. The main Conference, Oct. 15 -17, will offer presentations and panels that will address best practices for retirement organizations and ways in which retiree organizations can promote a sense of purpose and passion for retired faculty and staff. As a bonus, a half-day workshop will be held on Thursday, October 14, specifically for institutions considering creating new retiree organizations. For those who register before September 6th, registration fees are held to the 2008 rates. Wesleyan University is hosting us on a beautiful campus in the middle of fall foliage season in New England. Our gold sponsor is Belmont Village Senior Living and our silver sponsor is REES Architecture with the Covenant Village of Cromwell as our bronze sponsor.

#### "THANK YOUS" ABOUND

Many thanks to Conference co-hosts Karl Scheibe and Bill Wasch who are working hard with the able assistance of Gloria Gdovin to make our biennial conference a big success. Linda Pearson has done a great job organizing the program and kudos to Janette Brown, Jerry Walker, Bob Coffey, and Bob Scales from USC for extraordinary efforts to advance AROHE to the next level. Jerry Walker has done a terrific job driving membership and contacting over 1,000 universities by mail to encourage participation in the 2010 conference and he will pursue communication with the universities that Fancy Funk has contacted from the southeast. Jeri I. Frederick, Director of the Center for Emeriti & Retirees (CER) at the University of California, Irvine has graciously begun to edit PR and newsletter articles for promoting AROHE. Bob Coffey rose to the occasion to be interim treasurer and do yeoman's work applying a systems approach to our bud-



## AROHE PRESIDENT'S MESSAGE

#### - BY BARRY CULHANE

geting, record keeping and forecasting while also submitting the paperwork necessary for us to maintain our 503(c) status. Bob also completed an AROHE income-expense report indicating that AROHE is financially sound.

#### A NEW WEBSITE!

Janette and I have worked with RIT students, especially Brian Muller, and a team of USC graduate students to improve our website. I am pleased to say that we will finally migrate to the new website at the end of this month. Please be patient as we work out the kinks in the system. The main focus of this web development is to increase information and add value to the AROHE membership, with certain sections of the web accessible only for members.

### CURAC/ARUCC 8TH NATIONAL CONFERENCE

Janette and I were able to join AROHE board member and CURAC President, John Meyer, at York University, May 18-20, for the CURAC/ARUCC 8th National Conference. Janette gave a presentation entitled, "Making and Improving Relationships between Retiree Organizations and the Host Institution". AROHE is joining CURAC as an Associate Member, and we look forward to many CURAC members joining us for the AROHE Conference at Wesleyan.

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## SPOTLIGHT

## DOES WHAT YOU WATCH EFFECT YOUR LONGEVITY?

- BECCA LEVY, PHD.

**OUR KEYNOTE** speaker for the 2010 Conference in Connecticut has something to say about that question. As a matter of fact, Professor Becca Levy, PhD. and Associate Professor of Epidemiology (Chronic Diseases) and of Psychology from the Yale School of Public Health, Yale University, has done extensive research on the subject.

The fascinating research Dr. Levy is doing on images of aging in the media and elsewhere shows how they influence not only older people's perceptions of their own reality but also how long they live. She studies this by examining:

- 1) how psychosocial factors influence recovery and survival in old age;
- 2) how the aging process differs in cultures that hold diverse views of aging; and
- 3) how interventions, designed to trigger either positive or negative age stereotypes, influence a variety of outcomes in older individuals including memory, physical performance and cardiovascular response to stress.

Dr. Levy has received numerous awards for her innovative research including the Margret M. Baltes Award for Outstanding Early Career Achievement in Social and Behavioral Gerontology, the Springer Award for Early Career Achievement in Research on Adult Development and Aging, the Brookdale National Fellowship for

Leadership in Aging, and the Donaghue Investigator Award for "particularly promising medical researchers."

Dr. Levy had the pleasure of working with Dr. Butler on the Anti Ageism Task Force of the International Longevity Center. As part of this they produced a book called Ageism in America. She also presented testimony with Dr. Butler to the United States Senate on ways to reduce ageism in media and marketing.

With current projects including a fascinating array of topics from how age stereotypes held earlier in life predict cardiovascular events in later life to interventions to improving aging health, you will want a front seat on October 15th at the conference!



## A GREAT VALUE!

## How does AROHE Provide Great Value to its Members?

## THE "AROHE START-UP KIT"!

Members and non-members alike can receive free copies of this valuable document. The Start Up-Kit contains excellent examples of programs and activities carried out by a variety of retirement organizations. Easily readable, the AROHE Start Up-Kit is a good place to start in discussing what a higher education retirement organizations might do. As well, it provides existing organizations with useful new ideas!. The 20 pages of "attachments" also

provide good examples of by-laws and other key documents from several different universities. (The attachments are free to members only).

### 2. THE AROHE WEBSITE!

The AROHE website is your location for access to other member websites as well as useful articles and references, such as Continuing the Connection: Emeriti/Retiree Centers on Campus" (2005) by Shelley Glazer, Elizabeth Redmon and Karen Robinson featured in Educational Gerontology, 31: 363--383, 2005. http://arohe.org/

## THE AROHE BI-ANNUAL CONFERENCE!

Our members express the value of this conference best. As such, here are some quotes.

'Attending the 2008 AROHE conference was quite inspirational. The conference was well planned and covered interesting and relevant retiree issues. The speakers and panelists were quite good. I found the luncheon address by Roger Anunsen most moving.'



'Our latest best practice, which we incorporated to include both active employees of our institution as well as our retired faculty and staff and drew over 350 attendees, came from an idea shared among our AROHEcolleagues!'

'The greatest value is to look at all the different organizational approaches, best practices and services that are created by a passionate group of people who value retired faculty and staff.'

'I have applied many ideas to our university culture with positive results.'

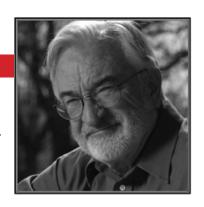
'AROHE offers the tested experience of others, opportunity for dialog, connecting with valued and pertinent people and resources.'

## 4. AROHE SURVEYS

Not only has AROHE conducted a comprehensive survey of universities in all 50 United States and Canada, but we periodically send out requests for information among our members and summarize the results for the members. AROHE has been contacted by the Chronicle of Higher Education to provide timely information about trends regarding retirees in higher education, and has published data collected from AROHE's survey. In addition, AROHE members receive customized consulting assistance and resources based upon data collection upon request. Please complete the 2010 AROHE Survey! The data will be presented at the AROHE Conference at Wesleyan this fall. Please go to: www.surveymonkey. com/s/AROHE2010Survey to take the survey. For specific questions about the survey data, contact Janette Brown: jcbrown@usc.edu.

# THE NONEXISTENT RETIREE

BY JERRY ECKERT, PAST PRESIDENT,
 SOCIETY OF SENIOR SCHOLARS
 COLORADO STATE UNIVERSITY



WHY, I ASKED, do retired faculty seem to fall into two camps? Most seem happy campers. They attend university functions, write bequests into their wills, praise their former employer, and keep connected. Others slink off into their retired lives angered and hurt by the institution to which they gave so many decades. A to Z. Loquacious praise vs. a litany of complaints.

At Colorado State University, much of the answer lies in a vacuum, a point where policy should exist and doesn't. Consider this. University policy captured in our faculty manual, offers guidance on how, when and under what conditions faculty may retire. Human Resource Services has their checklists and procedure guides to walk people through the process. But the day we turn in our keys and walk out the door, our metaphoric gold watch in hand, we retirees cease to exist. It turns out that all policy and procedure is written for employees. In the strictly legal sense, of course, no institution makes personnel policies governing folks who don't work for them. But universities are, or should be, different somehow. The sense of community is strong while employed; a sense of continued membership in that community is an important, appreciated, even a necessary part of retirement. The university as well as the retiree stands to gain. Formally recognizing retired faculty as a valued cohort within the university community is a win-win choice.

At Colorado State we employed a three pronged strategy to fill this vacuum. First, building an appreciation of the retired faculty cohort and the Society of Senior Scholars that represents them increased the university's receptivity for recommendations that followed. Two threads were important in gaining this recognition. One was a simple head count. At CSU, and most likely across the country today, retired faculty from four-year universities now outnumber hired faculty by 20-40 percent. 1250 vs. 985 at CSU at the moment. We retirees are numerous

enough to carry political clout, to become key cogs in capital campaigns, season ticket purchasers and the like. The second thrust developed a varied program for retirees which appealed to many in diverse meaningful ways. In a sense, the Society did their part up front. How could the administration not follow with support in several ways?

Key points of entree in our quest for recognition were the President, the President's public relations staff, the Provost and the Chair of Faculty Council. Strong support was received from all quarters. As I write this, formal recognition of the retired faculty cohort as a valued class within the university community is being written into the Faculty Manual. Our staffing, allocated facilities and budget were expanded, even in a year of severe fiscal stringency. And retirees can now receive the "infograms" from the President as part of his continuing dialogue with the broader university community.

A key source of retiree unhappiness springs from visible differences in what individuals are offered at retirement. Little things like e-mail accounts, electronic university identities, newsletter distribution lists, access to university libraries, gyms and other facilities count. Little things that can mean a lot as reminders of that treasured community membership. Without an official "identity" as part of the university, there is no standard procedure and the perquisites offered to retirees become an ad hoc function of their department chairs. At CSU, the 54 department chairs range from new off-campus hires with their new agendas to 40 year veterans who have slogged as colleagues through the same years as those faculty members now retiring. Something as simple as an SOP put out by the Provost's office eliminates most differences in individual retirement offerings. With them evaporates the hurt from perceived discriminations.

## HEADING EAST TO WESLEYAN

BY EDDIE MURPHY, DIRECTOR,
 UCLA EMERITI/RETIREES RELATIONS CENTER



**LAST OCTOBER** I sent an email to Janette Brown, my colleague at USC. I reminded her that a year had passed since she and I had chaired the last AROHE conference. We both mused how quickly time flies.

Based on our experience, we know that the co-chairs of the upcoming conference have been busy, planning, planning and planning! Before we know it, we will convene on the lovely grounds of Wesleyan University (October 1 4-17) to connect again as AROHE colleagues.

I look forward to all that is in store for us. I look forward to the opportunity to learn, to exchange ideas, to share, to network, to renew old friendships and to form new ones.

I want to make the most of the experience. To that end I have developed a plan:

- 1. Get plenty of rest, so that I can be alert. I don't want to miss anything prepared for us.
- 2. Dress comfortably. This won't be the time I wear that new pair of shoes. I want to be as comfortable as possible with little room for distraction due to discomfort of my clothing.
- 3. Take notes. I'll be prepared with ergonomically correct pens to take copious brief succinct notes. I want to be able to record major points for future use in the workplace.
- 4. Network. I plan to seek out those I've not met. Identify and meet with specific individuals who may have delivered information of particular interest, including application to my programs.
- 5. HAVE FUN. I want to take advantage of sight-seeing opportunities afforded at the conference site and nearby places. I have never been to Middletown, Connecticut and can only imagine the beauty that awaits me during the fall season.

Well, that is my plan. Do you have a plan to make the most of the offerings at the conference? If not, I encourage you to make one. Our conference planners will be glad you did!

# THE CONFERENCE PROGRAM

BY LINDA PEARSON, PH.D.,
 CHAIR, 2010 CONFERENCE PROGRAM

**THE PROGRAM** for AROHE's 5th biennial international conference reveals the dynamic and changing state of retirement organizations in higher education which must adapt and expand programming in response to profound trends and influences not only in education but also in society in general.

These trends include the challenging economic environment bearing upon institutions of higher education; an increasing number of persons, both faculty and staff, to be assisted in making the transition to retirement; and, the increasing number of retirees to be served and who want to stay involved and connected to their institutions. Trends such as these parallel an increasingly positive view of older adulthood and call for improved ways to engage retirees.

In line with the theme, Purpose & Passion in Retirement: Models and Best Practices, conference attendees will have the opportunity to attend panel presentations, breakout sessions and round table discussion groups gleaning ideas from other AROHE organizations responding to trends, meeting needs, and adapting. These opportunities, models and practices will provide examples as well as foster creativity and innovation resulting in more effective organizations which may serve as a means for individuals to experience and live purpose and passion during retirement years!

Panel presentations providing a broad yet focused view of timely topics continue to be the core of the conference program. Panelists represent a variety of retirement organization types and come from institutions across the United States and Canada providing insightful and diverse views. Representatives include individual members of retirement organizations, directors, staff, as well as institutional representatives who will offer their knowledge and experience.

## HIGHLIGHTS OF THE CONFERENCE PROGRAM.

The opening panel, Retiree Communication, Participation and Contribution: Models and Best Practices in Economic Hard Times, presents four retiree organizations' experience of growth, change and innovation in the midst of challenging circumstances.

Views from the human resources office, to the retirement center, to that of the individual will be shared on the panel, **Transitioning to Retirement:** Practices and Programs. Panelist will discuss the programs, workshops and retirement information they are using to assist both pre and post retirees to transition to retirement and once retired stay connected to and involved with the institution.

The panel, **Senior Housing**: Options, Decisions and Experiences, considers the as well as the personal decision-making involved in finding a satisfying residence during the retirement years. Views include a retirement organization's effort surveying their members concerning preferences for housing; the developer of a retirement community connected to a university; and that of a retiree and expert in modifying one's residence to stay in the home.

Two essential activities closely associated with a sense of purpose and passion in the lives of many retirees will be explored through panels on volunteerism and service and lifelong learning. The panel **Making a Difference**: Service & Volunteerism will focus on the types of volunteer programs and activities being offered by retirement organizations, how to implement such projects, and a new national initiative to engage retirees in volunteerism and service called Age4Action. The panel **Perspectives & Examples** in Lifelong Learning, will look at the types of lifelong learning programs being offered by college and university retirement organizations.

# THE AROHE MEETING AT SEA

APRIL 9-14, 2011



## CRUIS'N WITH AROHE:

SAIL INTO THE FUTURE WITH PURPOSE AND PASSION

**HOW ABOUT** planning a really big and meaningful excursion as part of your organizations' Spring activities? Bring a group of administrators, retirees, and friends from your school and join your AROHE colleagues at the Meeting at Sea.

This meeting-cruise which begins and ends at Ft. Lauderdale, includes Cozumel and Cayman Islands, and will have two days of meetings onboard the Royal Caribbean's Navigator of the Seas.

AROHE's Meeting at Sea will have two program tracks - one track designed for administrators, full-time and volunteer, of retirement organizations and the other track for retirees in general.

The first track will provide a follow-up for the attendees at the Wesleyan Conference, as well as for others, to continue their professional growth. With an extended five-day opportunity and an emphasis on workshops, administrators can work with colleagues from their schools and beyond on implementing best practices.

The second track focuses on 'productive leisure' for retirees. Administrators will want to have their spouses, partners and friends join them and take advantage of this economical cruise. The programs for these guests will emphasize enhancing leisure time.

Two keynote speakers will present to both groups and be available frequently throughout the meeting. Harry "Rick" Moody, AARP's director of Academic Affairs, has written over 100 scholarly articles, is the author of Abundance of Life, and has compiled a list of books on creativity at http://assets.aarp.org/rgcenter/ageline/creativity.pdf. Richard "Dick" Ambrosius, vice president for NeoCORTA, wrote Choices & Changes and has the blog Positive Aging and Brain Fitness athttp://mrpositive.typepad.com/my\_weblog/.

The estimated cost will be less than \$2,000 including meals, tax, tips, and registration for two with a balcony stateroom for the five-day cruise. Per person that is a \$200/day bargain! Inside state rooms are even more economical at \$549 per person. Schools reserving five or more staterooms will earn rewards with an additional reward for the school that reserves the most staterooms.

For more information go to AROHE's web page, www. arohe.org, and find the link to the Meeting at Sea or go to http://www.funseas.com/AROHE [must be in uppercase as shown]. For more details and for making a \$200/stateroom deposit refundable up to January 25, 2011 call or email Becky Peirce at (800) 805-7245, x210 and bpeirce@funseas.com with Holiday Cruises & Tours of Tallahassee.

## AROHE ON THE MOVE:



Carolina Inn, Chapel Hill, North Carolina

## PLANNING FOR 2012!

WE HAVE the site and dates set for 2012 International AROHE Conference in North Carolina. The 2012 international conference of AROHE will convene at the Carolina Inn in Chapel Hill, NC, Sunday to Wednesday, October 21-24, 2012. A tri-campus coalition, comprised of retired faculty representatives form NC Central University, NC State University, and UNC-Chapel Hill, chose the Carolina Inn because of its suitability for smaller conferences, its "walkability" to town and campus, and its convenience to other Triangle campuses and venues. The Inn, a Four Diamond facility with an interesting history, is recognized as a "little jewel." Its extensive remodeling of guest rooms will be completed by summer, 2012.

2012 marks the tenth anniversary of AROHE that had its beginnings on the NC State campus. In addition to the Chapel Hill sessions, a major conference anniversary event will be held in Raleigh and other sessions will be held on the NC Central campus in near-by Durham.

AROHE accepted the coalition's recommendation for a Sunday to Wednesday schedule rather than a more traditional weekend conference schedule because hotel facilities throughout the Triangle are heavily booked during October weekends, and the Inn can offer better rates during less competitive times. The early week dates of October 21-24 also miss the NC State Fair and its attendant traffic.

Coalition members have already begun to discuss committee structure and recruitment, program suggestions, distinguished guests, special events, sponsors and other considerations that require knowledge of our communities, know-how for implementation, and long-range planning. Early in 2011 the coalition will convene a planning meeting with the member institutions of the University of North Carolina System and independent institutions of higher learning from across the state.

## STRATEGIC PLANNING

BY BARRY COHEN, AROHE PRESIDENT

**AROHE** exists on the basis of wonderful contributions of volunteer time and other resources by board members, especially the Executive Committee. We appreciate that many university institutional resources have been utilized to sustain and advance AROHE. As I prepare for the new academic year at RIT, I want to recognize that none of my involvement with AROHE these past 10 years would have occurred without the blessings of the presidents I have served.

At the end of the conference at Wesleyan, the AROHE Board will meet and receive nominations for the Board of Directors and Officers. After nominations are accepted and members have an opportunity to review biographies, AROHE members will vote for the board members. We will then revisit AROHE's structure, reignite the strategic planning process and conduct a self-evaluation in three areas:

- 1) Is AROHE fulfilling its mission as originally intended?
- 2) Are the current structures and bylaws sustainable?
- 3) Is AROHE positioned to establish its niche in higher education?

We will continue to pursue a strategic plan which includes a practical way to execute our strategies.

At the Conference, I hope to have the opportunity to have face-to-face discussions with many of you regarding the future of AROHE. We have made progress since the AROHE conference at USC and we will delineate that progress in a future email blast to members.

#### AROHE MEETING-AT-SEA 2011 AND AROHE 2012

Fancy Funk has been working very hard to make sure the Meeting-at-Sea April 14-17, 2011, is a huge success. Please see her article in this newsletter for all the details. One way all of us can help is to sign up for the cruise meeting as soon as possible (see AROHE.org home page link to the Meeting-at-Sea). The price is right and if we fill our designated number of state rooms with AROHE members and family, AROHE will benefit significantly.

The Board voted to hold our next biennial conference in 2012 at the University of North Carolina, Chapel Hill, hosted by Bobbie Lubker. The significance being in North Carolina is that it will be the tenth anniversary of the original discussions initiated by Paul Hadley to form AROHE, building upon many retiree events emanating mostly from California.

#### A WORTHWHILE CHALLENGE

The nature of AROHE, with retirement organizations in disparate locations, and with some members retired and some members working full-time, creates significant communication challenges. We have bridged the gap with monthly board conference calls and email blasts. We must continue to work together to enhance the reputation, value and effectiveness of AROHE. I look forward to meeting all of you in person at the AROHE conference and hearing your input. In the meantime, please encourage colleagues and friends to attend the AROHE Conference at Wesleyan University.

Best regards, Barry

## THE CONFERENCE PROGRAM

**CONTINUED FROM PAGE 7** 

These sessions will close with **Essential Ingredients** for Successful Retiree Organizations. Goal setting, planning, and contributing to the life of the institution are essential to sustaining and expanding retirement organizations. This panel will offer methods and techniques while also providing insight into the ways that university based retirement organizations actually do contribute to their institution.

Added to this year's conference program are increased opportunities for networking and in-depth discussion through breakout sessions, round tables and poster sessions. These smaller, focused sessions will provide attendees additional opportunities for personal dialog



The Middletown Inn is a charming spot where most of the conference attendees will be staying.

to share ideas and experiences. To this end, a round table, Unique University Service Projects, will further explore the topic of volunteerism and service through discussion of practical service projects carried out on individual campuses. Another round table, Renewing your Retirement Organization will encourage dialogue about rejuvenating established retirement organizations. A follow-up session, Implementing Lifelong Learning Programs, will exemplify the challenges and rewards of operating lifelong learning programs.

We hope you will find this conference not only an opportunity to learn and network but also a bountiful source for innovations and enthusiasm to take back to your institution and/or your retirement organization.

## AN OPPORTUNITY

#### WOULD YOU LIKE TO PRESENT AT THE AROHE MEETING-AT-SEA?

All AROHE Meeting-at-Sea attendees will have the opportunity to present, moderate, or lead discussions. We welcome your submissions for topics, networking leaders for discussions, round table presentations, and poster sessions.

Those interested in having their names and topics publicized on the web and in other promotions must submit their ideas by Nov. 8, 2010 to: info@arohe.org

## The Association of Retirement Organizations in Higher Education

Regional Conference-At-Sea



INSIDE STATEROOM: from \$549\* pp OCEAN VIEW STATEROOM: from \$649\* pp BALCONY STATEROOM: from \$799\* pp

Conference Fee: Member: \$75 Non-Member: \$100 Spouse/Partner/Travel Companion: \$25



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www.FunSeas.com/AROHE for more information

Royal Caribbean's Navigator of the Seas April 9 - 14, 2011





\*rates are per person, double occupancy. Airfare, gov't fees and transfers are extra

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