

# AROHE

Association of Retirement Organizations  
in Higher Education



## AROHE Conference Comes to Carolina

by *Bobbie Boyd Lubker*

In the almost 8 years that I have participated in the Association of Retirement Organizations in Higher Education (AROHE), a pleasant undercurrent of conversations about “elder progress,” “on-going roles in our institutions,” and “getting organized” has grown into a wave of change-permitting new actions, attitudes, aims, and alliances by retirees from colleges and universities.<sup>1</sup>

The upcoming 2012 Conference is going to feature a consortium of resources and experts which give evidence of AROHE’s new actions, attitudes, aims and alliances, i.e., progress. The new and improved web site ([www.arohe.org](http://www.arohe.org)) contains all the conference details.

AROHE celebrates its tenth anniversary at the biennial conference October 21-24 hosted by retiree associations at three sister universities - NC Central University; NC State University; UNC-Chapel Hill in the Triangle (Raleigh, Durham, and Chapel Hill), the heart of Carolina. Below are some quick highlights:

**Theme:** “Innovations for the Next Decade: A Triangle of Adventures in North Carolina”

**Headquarters:** One angle of the Triangle - The Carolina Inn, Chapel Hill, NC

**Welcoming Reception:** Home of the President of UNC University System

**Paul Hadley Lecture:** The prestigious Paul Hadley Lecture will be delivered by Trudier Harris, PhD, professor emerita of English, UNC-Chapel Hill. Dr. Harris is a well-known speaker and author who has, in retirement, opened

a next-career phase and stays connected to the academy by joining the faculty at the University of Alabama. Her extensive scholarship focuses on folklore and African American literature.

**The Program:** There will be a grand selection of topics where presenters will explore both practical and scholarly emphases. A geographic crisscross of presentation proposals has come from CA to MA, AZ to PA, IA to GA, MT to CT, and Canada to The Carolinas. The lectures, workshops, and round tables will include oral history projects, multi-campus organizations, successful practices for progress, elder scam and fraud prevention, retiree association research, inappropriate health decisions, survey data on retiree associations, and problematic health care decisions for elders.

Please read on to see more specifics about the upcoming conference. Frank Abrams, PhD, professor emeritus of North Carolina State and convener of the tri-campus conference planning coalition, expresses his enthusiasm for the AROHE conference. **“You will not be able to attend this conference without being further educated, massively entertained, and warmly welcomed. You may not want to ever leave the Triangle.”**

And remember what Bob Barker, retired host of *The Price Is Right*, used to call out. “Come on down!”

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1. (*This comment appeared in the April/May 2012 edition of Retirees Newsletter, published by the State University of New York (SUNY) Retirees Service Center, p.9.*)

## IN THIS EDITION

- 1 AROHE Conference Comes to Carolina
- 2 What Excites Me Most About the October Conference?
- 3 Continuing the Visibility Campaign
- 4 AROHE Institutions Win ACE/Sloan Award Grants and ACE joins AROHE
- 4 Welcoming Susan Kress
- 5 AROHE Volunteer Highlight: Linda Pearson
- 5 AROHE Board Behind the Scenes
- 6 A Broader Horizon
- 7 New AROHE Website Features
- 8 Recommended Reading and Resources
- 8 Forming the Georgia Consortium
- 9 New Ideas Corner
- 9 What About a Personal Residence Exchange?
- 10 What Does AROHE Do?
- 11 The 20th Annual Conference of the Big Ten Retirees Association



## What Excites Me Most About the October Conference?

By Linda Pearson

The AROHE Conference has such a wide spectrum of information to share that will be of interest to many types of retiree organizations. Those that are long-standing, new, large or small, as well as units that support them such as academic affairs, human resources, alumni, and institutional advancement will all benefit from the Conference.

Our conference theme, *Innovations for the Next Decade*, turns our attention to the future and helps to familiarize us with information, resources and skills needed to create and sustain creative, dynamic and future-oriented retiree organizations for our campuses. The sub-theme, *A Triangle of Adventure*, suggest challenging and stimulating sessions as well as the commitment and involvement of three local institutions of higher education who are serving as the conference hosts known as the Tri-Campus Coalition. They are North Carolina Central University, North Carolina State University and the University of North Carolina at Chapel Hill.

Exciting also is the inclusion of three themes vital to the lives of retirees: Living Life, Health and Wellness, and, Connectedness. These themes will be addressed by four well-qualified keynote speakers Trudier Harris, Robert Clark, Nortin Hadler and David Perlmutter, each with a connection to higher education and offering stimulating, insightful information. The many high quality panels and presentations address both practical aspects of retiree organizations as well as recognize emerging trends. Among these will be a presentation titled *A New Generation of Retirees* where members of UCLA retiree organizations will discuss their efforts to address the challenges of involving both younger and older retirees. A presentation titled *Programming as an Organization Mission* will describe the connection between the University of Washington Retiree Association and the University's office for Alumni and Constituent Relations. Multiple institutions will form a panel to examine the types of education and lifelong learning endeavors being undertaken by retiree organizations. The panel will include Karl Schiebe of Wesleyan University who will tell about *Reaching Out from the Center: Educational Efforts of the*

Wash Center and Dennis Taylor of Boston College who will tell about their *Retired Faculty Research Seminar*.

There will be several opportunities to learn about the types of higher education retirement organizations, both associations and centers. One way this will be done is networking exchanges for those associated with *Forming Local Consortiums* lead by Dave Ewert of Georgia State University, Lucy Rollin, Clemson University and John Bugge, Emory University; *Multi-Campus Associations* lead by Rod Rose, UCLA; and, *Small and Newly Formed Organizations* lead by Peace Mullen of Montana State University. A panel on *International Perspectives* lead by John Myer, CURAC, will give conference attendees the opportunity to learn about higher education retiree organizations in Canada and in other countries.

Practical aspects of retiree organizations will be addressed as AROHE Executive Director Janette Brown discusses recent findings of AROHE's ongoing *Survey of Retirement Organizations*. Sue Barnes, director of the UC-Davis Retiree Center, will help conference attendees understand the importance of volunteerism with her presentation, *Jumpstart Your Volunteer Program*. The importance of obtaining member feedback and regularity in programming and outreach efforts will be discussed by Len Gordon, Dean of the Arizona State University Emeritus College in his presentation, *What Makes for a Successful Emeritus College*.

I am also excited about some of the additional speakers such as Brian Kaskie, University of Iowa Center on Aging, who will talk about *Workplace Wellness* based on his research funded by TIAA-CREF and focused on college and university retirees; David Kirkman, North Carolina Assistant Attorney General will discuss *Fraud, Vulnerability and Aging*; and Andy Dobelstein will discuss, *Social Security: the Jewel in the Crown of American Social Welfare*. Dobelstein is an expert on Social Security and a member of the UNC-Chapel Hill Retiree Association. These are only a few of the presentations and there are several others related to historical preservation, housing, financial and health care issues.

I look forward to seeing conference attendees grow in their understanding of and enthusiasm about the potential of retiree organizations. Conference attendees make new friends and have enthusiastic discussions as they explore new ideas and potentialities for their own retiree organization and campus.

Finally, I look forward to seeing friends made at previous AROHE conferences and making new friends of those who will be attending for the first time. I am looking forward to exploring the city of Chapel Hill and the campuses of the three local hosting institutions. And, you may just find me at Franklin Street near the conference hotel, as I have been told it offers a wide array of shops and restaurants.

*Note: Linda Pearson serves on the AROHE Board of Directors and currently holds the office of Secretary.*

## Continuing the Visibility Campaign

In the spring, Dr. Bobbie Lubker, president of AROHE, met with Dr. Scott Ralls, president of the North Carolina Community College System (NCCCS). They agreed that they would work on ways to acquaint NCCCS retirees with possibilities and potential for retiree associations in this population that is typically more fluid and diverse than those from four-year institutions. She also wrote to Thomas Ross, new president of the University of North Carolina System, to ask him to continue the relationship with NC retired faculty associations and AROHE established by his predecessor. President Ross appointed two staff members from the University System's General Administration (GA) to serve as liaisons between GA and AROHE and retiree associations in the state's public institutions.

In mid-summer, Dr. Lubker met with Dr. A. Hope Williams, president of North Carolina Independent Colleges and Universities (NCICU), to open a dialogue about independent institutions' participation in AROHE and with their sister public institutions in activities designed for and by faculty and staff retirees from higher education. NCICU's 36 members include such widely known institutions as Duke University and Wake Forest University. Dr. Williams has been president of NCICU for more than 20 years and never before had anyone talked with her about retiree organizations, retiree contributions, connectedness, and interests in any context other than Human Resources. Dr. Williams met warmly the information about AROHE, the October 2012 conference and potential for forming associations. She will take the responsibility to find out which of NCICU's North Carolina campuses do and do not have retiree associations, to give them information on AROHE and the conference.

In each of these contacts with the leaders in her state, Dr. Lubker reports that she was met pleasantly and with insightful questions about roles and responsibilities for retirees.

The principle presented in these paragraphs: Get visible. Take some initiative. Reach out to the leaders in your institution and state. Does your chancellor/president or the system president know you? Don't call to talk with him/her. Call the executive assistant and make an appointment. Be sure to tell the assistant what you want to talk about. Briefly. You will be surprised at how willing these leaders are to meet retirees—especially those with a clear message who continue to be productive. Go prepared with AROHE brochures and web address and a clear idea of the value that you have found in your association with AROHE.





Photo by @Lisa Helfert Photography. AROHE members institutions are in bold.

**Back row:** Scott Chadwick (Xavier Univ.), Vicki LaFarge (Bentley Univ.), Rhonda Forman (**Univ. of Washington**), Binnie Singh (**UC Davis**), Roy (Chip) Wiggins (Bentley Univ.) **3rd row:** Ellen Junn (San José State Univ.), Rosario Gerhardt (GA TECH), Maureen Stanton, (**UC Davis**), Beverly Nagel (Carleton College), Pam Stacks (San José State Univ.) **2nd row:** Susan Kress (**SKIDMORE**), Kim Bottomly (WELLESLEY), C.C. Clauss-Ehlers (Mt. Holyoke College), Cheryl Cameron (**Univ. of Washington**), Amy Strage (San José State Univ.), Peter Stearns (George Mason Univ.), Linda Harber (George Mason Univ.) **Front row:** Archie Ervin (GA TECH), Molly Corbett Broad (ACE), Lynn Pasquerella (MT. HOLYOKE), Andrea Chapdelaine (ALBRIGHT), Sandra Johnson (PRINCETON), Marty Levine (USC), Janette Brown (USC).

## AROHE Institutions Win ACE/Sloan Awards and ACE Joins AROHE

The *Innovative Practices in Faculty Retirement* competition sponsored by The American Council on Education (ACE) and the Alfred P. Sloan Foundation in June recognized four AROHE members as winners: Skidmore College, University of California Davis, the University of Southern California, and the University of Washington. The awards included a \$100,000 grant for each institution to continue promoting and developing their best practices in retirement transitions.

“With the generous support of the Sloan Foundation, ACE is pleased to recognize institutions for creating win-win solutions that involve faculty in meaningful ways before, during and after retirement,” said Gretchen Bataille, senior vice president for Leadership and Lifelong Learning at ACE. “Our intent in funding awards is to broaden the national conversation and the agenda within higher education to take into account the full scope of the culminating stage of faculty careers,” said Kathleen Christensen, Working Longer program director, Alfred P. Sloan Foundation. “We are hopeful that award winning-institutions can provide examples for our community of thoughtful approaches that can be modeled.”

We are pleased to report that ACE has become an AROHE member and three ACE representatives will present at the AROHE Conference: Claire Van Ummersen, ACE Senior Advisor, president emeritus of Cleveland State University (1993-2001), former chancellor of the University System of New Hampshire (1986-92); Jean McLaughlin, ACE Associate Director, Division of Leadership and Lifelong Learning; and Lauren Duranleau, ACE Program Specialist.

## Welcoming Susan Kress

Please join us in welcoming Susan Kress who is recently retired from Skidmore College. Susan was Vice President for Academic Affairs at Skidmore College and was responsible for writing the grant application that won Skidmore an ACE/Sloan award. Skidmore College is receiving a \$100,000 grant from the American Council on Education and the Alfred P. Sloan Foundation for its innovative work in faculty retirement.

Along with 14 other institutions honored, Skidmore demonstrated a best practice in three stages in culmination of faculty careers: the development of a legacy, the transition into retirement and the continuing involvement of faculty in the academic community post-retirement.

Susan is delighted that Skidmore was recognized for its efforts to support faculty transitioning toward retirement and retired faculty. “Retired faculty members are one of a College’s richest resources. This award will help strengthen connections between the College and its retirees to the great benefit of both,” said Kress.

Janette Brown, AROHE Executive Director, met Susan at the ACE/Sloan Awards lunch meeting and was very impressed. (Susan is included in the attached ACE photo-2<sup>nd</sup> row – far left). Although Susan had just retired, her college president insisted on sending her to the awards event. She is very interested in retirement transitions and is just learning about AROHE. We welcome her to our organization and hope to see her at the AROHE Conference.

## Highlight: Linda Pearson – AROHE Member and Volunteer

Linda Pearson, Ph.D. has been involved with AROHE since 2002 when she helped to organize the inaugural conference held on the campus of Indiana University in the fall of that year. While at I.U. as a professional staff member in the Office of Academic Affairs and Dean of the Faculties she helped to establish Emeriti House, an on-campus center for the retired faculty of the University. Linda serves on the AROHE Board of Directors and currently holds the office of Secretary. She has lead the development of a database of model programs, co-authored the first AROHE survey and served as the conference program chair for the 2008, 2010 and 2012 conferences.



Linda received the Ph.D. from the School of Education at Indiana University in the area of Developmental Psychology with an emphasis in Adult Development and Aging. Her professional interests include educational programs for adults and older adults, lifelong learning, employment programs and social support organizations. Linda has been involved with research projects related to employment programs for older adults, technology learning of older adults, retirement satisfaction, global aging, and, a school-based intergenerational program.

Linda is a member of AROHE and an Affiliate of Division 20, Adult Development and Aging of the American Psychological Association. She is an Adjunct Faculty member at Ivy Tech Community College of Indiana. Linda enjoys traveling, nature and being out-of-doors and makes a small garden each summer. Her garden project this summer was producing tomatoes and peppers of different colors (a limited success).

## AROHE Board Behind The Scenes

by *Bobbie Lubker*

The AROHE Board and Janette Brown, AROHE executive director, are diligently at work and, like Hank Williams, “movin’ on.” Several Articles in this newsletter demonstrate the results of many budget saving conference call conversations and decision-making that reveal AROHE’s growth and progress in the items delineated below. Three to five AROHE Board members and general members are involved in each of these activities:

- Conference agreements, progress reports and approvals
- ByLaws revision
- Development of a Governance Manual
- International Committee explorations in UK and around the globe
- Nominating Committee outreach for prospective nominees
- Membership recruitment; long range planning for campus contacts
- Promotional video, visibility publications
- Conference site selection for 2014 and 2016
- Newsletter scheduling and content planning
- New organizational models for associations
- Home exchanges
- Canadian contacts through CURAC (College and Univ. Assns of Canada)
- Planning/implementing SUNY system-wide AROHE membership initiative
- AROHE survey data utilization
- Concerns of continuing campus access
- —and a host of golden daffodils yet to be discussed.

I never thank people for their “time.” Is ‘giving their time’ why we ask people to participate? AROHE Board members volunteer their expertise, knowledge, and experience. AROHE could not operate without them. That’s why we thank them.

How can you participate? Please let us know who from your association, neighborhood, or state would help AROHE continue to grow. And a final quote borrowed from General Electric. “Progress is our most important product.”





## **A Broader Horizon?**

*By Ken Rea*

Do post-secondary retiree organizations exist outside the US and Canada? If so, do they resemble those we are familiar with – or

are they fundamentally different in structure, membership and purposes?

Some preliminary research undertaken in conjunction with a project of Senior College at the University of Toronto suggests that they do exist in several other countries and they often resemble North American organizations in at least some respects, and that becoming familiar with them and establishing contacts could be useful to us all.

So far, we have found organized post-secondary retiree groups in the UK, India, Africa, and Australia. The limited results to date reflect the fact that our search has been confined to English-language sources. As in the US and Canada, some of these groups have only academic retirees as members, others have both academic and non-academic members. Some appear to be largely social, others more oriented to advocacy purposes.

In the UK, most of these appear to be of quite recent formation. At Oxford, for example, we find the Association of University Pensioners, founded in 1985 for the purpose of keeping retired staff in touch with each other and with the University department or institution that employed them. All retirees, academic and non-academic are automatically enrolled in the association. Those who wish to engage in the social activities it sponsors pay a small annual fee. (Association of University Pensioners, Finance Division)

At Cambridge retirees appear to be organized in college-based Emeriti Societies most of which have a rather narrowly academic focus. An exception is the Homerton Retired Senior Members Association which enrolls both retired faculty and senior administrative and other staff members who have made recognized contributions to the life of the college. Established in 1984 it has a written constitution with the main aim of promoting continued social and intellectual contact with the College. ([www.homerton.cam.ac.uk/teaching/Retired%20Senior%20Members%20Association.html](http://www.homerton.cam.ac.uk/teaching/Retired%20Senior%20Members%20Association.html))

The Former Staff Association at the University of Kent appear to have a somewhat broader mandate. A liaison group, drawn from and elected by the membership fosters links between the members and manages the Association's relationship with the University administration. It also organizes social activities and a variety of events. ([www.kent.ac.uk/alumni/pdf/fsaleaflet.pdf](http://www.kent.ac.uk/alumni/pdf/fsaleaflet.pdf))

In Africa we find an organized group comprising retirees from three universities in Ghana – the University of Ghana, Legon, Kwame Nkrumah University of Science and Technology, Kumasi and the University of Cape Coast. Total membership according to a news report in 2005 stood at 1,350. (Ghana Universities Pensioners Association - [ModernGhana.com](http://ModernGhana.com)) Such organizations appear to be more advocacy-oriented than those in the UK and indeed can become directly involved in national political life. In Nigeria, for example, the Federal Universities Pensioners Association (FUPA), last year came out strongly to support President Goodluck Jonathan's proposals to fast track economic growth, stability and national cohesion)

Similarly, the large number of post-secondary retiree organizations in India tend to be quite militant and have, as they would say, a keen interest in securing pensions and benefits for

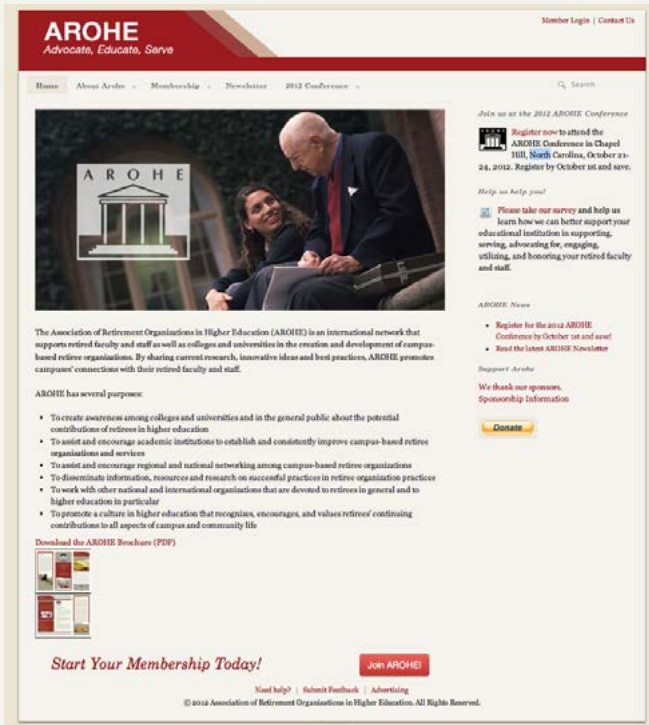
their members. To illustrate, a news item in the Chandigarh Tribune in December 2011 reports that, “The Himachal Pradesh Agriculture University Pensioners’ Welfare Society, Palampur, has decided to honour its octogenarian members ... at the annual convention .... It will also discuss the pending issues of reimbursement of medical bills, payment of arrears of revised pension and gratuity.

There appear to be very few post-secondary retiree organizations in Australia and New Zealand. But one, based at the Australian National University in Canberra, appears to be remarkably similar to many such groups found in the US and Canada. Identifying itself as, “A Community of Retired Scholars”, it includes retired academic staff and professional officers of the University and retirees with links to other universities or similar institutions, such as galleries, libraries, museums, government departments and community groups. Early this past January we established contact with the Secretary of the Australian National University Emeritus Faculty who put us in touch with their President, John Molony, who responded immediately, saying that “... your message to us is marvelously refreshing and encouraging. We are at last on the road to an international community of scholars. Thank you.”

Encouraged by such a strong expression of interest we propose to expand our efforts to identify and eventually establish communication with post-secondary groups in other countries. **Obviously we need help**, particularly from retired colleagues who have established contacts with people who share our interests in Mexico, Brazil, Argentina, France, Germany, Italy, Spain, Russia, China, Indonesia, and wherever retired university and college people are to be found. By teaming up with AROHE to pursue this undertaking we hope to expand it well beyond what we could expect to accomplish on our own.

For the full article, please go to [www.arohe.org](http://www.arohe.org), log in, and go to the resources section.

*Note: Ken Rea is Emeritus Professor of Economics, Founding Fellow of Senior College at the University of Toronto.*



## New AROHE Website Features

Thanks to the efforts of Tom Stolz (UC Davis) and Star Rosencrans (former USC web designer), we have two deeply redesigned sections of our AROHE website. It is still a work in progress, but you will notice that our front page for the general public has a clean, simple, updated look. They have built upon the good work of our two RIT student designers who created the AROHE membership website which was presented at our 2010 AROHE Conference.

Our new un-password protected AROHE website will make it easier for potential new members to learn about or join AROHE, register for or sponsor our AROHE conferences, take the AROHE survey, and view our brochure and by-laws. It is also simple for us to update the content without a skilled web master. (Thanks Star!)

The very complicated password protected part of the AROHE web allows our AROHE members to search members by state/region, institution, organization, or individual's last name. (Use your email address as your user name, please.) You can view the “live” AROHE survey results as people take the survey because it is automatically updated on line. The survey offers information about what other organizations are doing so that you can compare your institution with others across North America. It also provides ideas for use in your organization. In addition, in the resources section, we have shared the presentations from the 2010 AROHE Conference plus the contact information of the conference attendees. We will be adding this information for the 2012 AROHE Conference in November. (Thank you Tom!)

**CONTINUED NEXT PAGE**



## AROHE Website Continued

Each AROHE member organization can have three representatives and a billing contact that can access the password protected area. Many are beginning to join AROHE as individuals so that they stay connected with members, have control of their annual membership, and are kept abreast of all the new trends, communications, and resources. If you need help logging in or wish to offer suggestions to improve the web site, please send a message to [info@arohe.org](mailto:info@arohe.org).

## Recommended Reading and Resources

[www.civicventures.org/contact.cfm](http://www.civicventures.org/contact.cfm)

Civic Ventures is a nonprofit think tank on boomers, work and social purpose.

[www.geron.org/Resources/Online%20Store/gsa-products/civic-engagement-in-an-older-america](http://www.geron.org/Resources/Online%20Store/gsa-products/civic-engagement-in-an-older-america)

Civic Engagement in an Older America is a publication featuring a collection of best discerning writings on the subject of aging and civic engagement. It includes classic articles about work and volunteerism as well as provocative essays calling attention to new possibilities.

[www.campuscontinuum.com/index.htm](http://www.campuscontinuum.com/index.htm)

Campus Continuum consults with developers and academic institutions on planning, marketing and operating university-branded 55+ active adult communities that are tightly integrated with academic host institutions.

[www.help4srs.org](http://www.help4srs.org)

H.E.L.P. is dedicated to empowering older adults and their families by providing impartial information, education and counseling on elder care, law, finances and consumer protection so they may lead lives with security and dignity.

## Forming the Georgia Consortium

*Chair's Column taken from Emerities February and May 2012*

*by Dave Ewert*

On January 5th our Emeriti Association and Emory's Emeritus College hosted a day-long meeting of representatives from retiree organizations similar to ours from 11 public and private institutions of higher learning in Georgia. Held at Georgia State, the meeting included participants from Clayton State, Emory, Georgia Health Science University (formerly the Medical College of Georgia), Georgia Tech, Georgia Perimeter, George State, Kennesaw State, Morehouse School of Medicine, Oglethorpe, University of Georgia, and West Georgia.

During the meeting, attendees shared information about their respective programs and activities. Across the board, the most popular programs deal with retirement benefits. Additionally, some retiree organizations are either funding student scholarships or aspiring to, and one of the retiree organizations provides research grants for its retired faculty. Other associations offer ambitious programs such as overnight trips and overseas tours.

The consensus at this meeting was that we should establish a Georgia association of higher-education organizations that are dedicated to working with their retirees. One participant said, "I got so much from the interactions and absolutely have a list of ideas to implement quickly and some to work on adding."

The Georgia consortium had its second meeting April 20th at Emory. Again, there was an enthusiasm for sharing thoughts on programs. Since our first meeting, other schools adopted and adapted programs similar to our High Museum visits and economic forecasting presentations which was gratifying and encouraging.

Because of GSU's and Emory's effort to form the Georgia consortium of higher education retiree organizations, the president of Columbus State University invited me to speak at their annual meeting of retirees. In my presentation at Columbus State I could discuss GSU's programs plus what a dozen other Georgia schools are offering. This information and the examples used should help Columbus State initiate and develop its own retiree organization.

Our Emeriti Association learns and benefits from what schools across the nation are doing for their retirees by being a member of the Association of Retirement Organizations for Higher Education. The Georgia consortium schools, to further their growth, will be members of AROHE.

Within AROHE, the success of the Georgia consortium is not going unnoticed. For example, in early June, Clemson University hosted its first meeting to form a consortium of South Carolina schools. At AROHE's October meeting at the University of North Carolina - Chapel Hill, my colleagues at Emory and Clemson and I will have a session discussing the purpose of local consortiums and how to launch and manage them.

Note: Dave Ewert is the Chair of the Emeriti Association at Georgia State University. He is Professor Emeritus of Finance and Director Emeritus of the Executive M.B.A. program at Georgia State University.



## New Ideas Corner

The UC Davis Retiree Center recently inaugurated an event that provided new retirees with information to help them continue their connection to the campus. Nearly 150 new retirees attended the UC Davis “New Retiree Resource Day,” where they were able to obtain their retiree ID card and parking permit, sign up for e-mail forwarding and collect information from over 20 departments and community organizations who provide services for retirees.



“I got the idea for this event after speaking with a new retiree last year, who said it took her all morning to drive around campus to the different departments to get her ID card, library card, parking permit and e-mail forwarding,” said Sue Barnes, director of the UC Davis Retiree Center. This retiree went on to say that she did not feel very welcomed as a retiree because of the difficulty of obtaining her retiree benefits. Barnes thought about her statement and

decided to organize the resource day for new retirees.

Exhibitors included nearly 20 different departments and organizations that provide services to retirees, including nutrition counseling, fitness programs, healthcare and benefits counseling, information on preventing scams and fraud, financial planning services, lifelong learning classes, and opportunities to support or volunteer for the campus. Two local senior residential communities, both of whom provide financial support to the Retiree Center, participated as well. The event was co-sponsored by the UC Davis Emeriti Association and the UC Davis Retirees’ Association, both of whom exhibited at the event. Nearly 40 of the attendees joined one or the other of the associations on the day of the event.

While the event took quite a bit of coordinated effort and the assistance of several volunteers, it was a very successful endeavor. New retirees appreciated the opportunity to learn about the many ways they can stay connected to the campus and a large number of them expressed interest in continued support of the university.

For more information about the UC Davis New Retirees Resource Day, visit the Retiree Center’s website of past events at the following link: [retireecenter.ucdavis.edu/pastevents.html](http://retireecenter.ucdavis.edu/pastevents.html). If you have questions, contact the UC Davis Retiree Center at [retireecenter@ucdavis.edu](mailto:retireecenter@ucdavis.edu).



## What About a Personal Residence Exchange?

By Lou Bender and Fanchon Funk

The Florida State University Association of

Retired Faculty (ARF) Board of Directors is exploring special projects that may benefit the members. Among the ideas discussed by the Board was the possibility of creating a Listing of FSU ARF members interested in an exchange of their home/apartment/condo/time share with counterpart ARF members at peer institutions throughout the United States.

A Directory would be developed whereby photos of the property and background information could be made available for interested retired faculty in other parts of the country. ARF retirees who would like to spend some time in a different region of the country could have a vacation that doesn’t cost much more than staying home. Others who plan foreign trips who would like to have their residence occupied while away might use the listing to identify retirees interested in renting. There would be some comfort in knowing such an exchange would be limited to a peer group of professionals. Dr. Fancy Funk, ARF’s National Liaison with AROHE, has already shared the idea of such a Residence Exchange with the AROHE Board of Directors.

What about insurance? The homeowners insurance of each participant remains just as if you went on a trip. And, there are separate insurances which can be purchased such as Accommodation Insurance which covers you if, upon having agreed to swap and have bought travel packages, that will cover you. This is separate and must be individually purchased. If you call your insurance agent, you can get specific information on the specific concerns.

If interested in such a possibility, please call Lou Bender @ (850) 562-4663 or email him at: [lbender@fsu.edu](mailto:lbender@fsu.edu).



## What Does AROHE Do?

By Janette Brown

A variety of administrators and faculty from institutions across North America contact our AROHE corporate office every month with questions about starting a retiree organization or supporting one. These contacts provide us with information about what institutions are doing for and with their retiree populations. In addition, through our work on the AROHE survey, we are privy to information submitted by campus retiree organizations who are both AROHE members and non-members. In this article, I will focus on our most recent inquiries made by individuals needing assistance for their retiree organization.

Over the past few years, we have been contacted by two distinct groups. The first group is composed of retirees or administrators in the process of establishing campus retiree organizations. They need help knowing where to start and how to get organized. The second group is composed of retiree organization leaders looking for ways to improve relationships with their campus administrations or learn new successful practices to benefit their campuses. Although AROHE is rarely contacted about retiree health and financial issues, these are two uppermost retiree priorities.

The AROHE office supports both newly forming and currently established retiree organizations. Some of the best ways we assist them are by providing customized consulting, sending the AROHE Start-Up Kit with its accompanying attachments, offering access to the AROHE survey responses, and providing web access to resources developed by our AROHE members. Our AROHE members themselves are valuable resources who provide insight based upon experience. The insight gained through AROHE members discussing successful practices is frequently customized to suit different campuses.

In the case of newly forming associations and organizations, sometimes it is hard to know where to start. And although AROHE members from long-established retiree organizations can provide experienced insight, often times AROHE members from newly formed organizations offer the most detailed and valuable information for a startup organization. At the upcoming AROHE Conference, there will be many chances to network with new and long-established retiree organization representatives.

An important tip for all organizations is to identify and engage well-known and respected faculty and administrators (retired or not) to be spokespersons and champions for your organization. Those that are deeply knowledgeable about your campus' culture and political structure can be valuable supporters that will connect your retiree organization across campus. They can also help garner resources and support from important campus units.

Another important tip emphasizes the importance of having support from the academic side of the institution. A chancellor's or provost's support makes a big difference. However, in these hard economic times, we have seen financial support for retiree organizations coming from human resources departments, alumni associations, and foundation or development offices.

We encourage you to connect with AROHE, become an active member, use the password protected resources on the AROHE web site, and attend the upcoming AROHE 10th Anniversary Biennial Conference October 21-24, 2012 in Chapel Hill, North Carolina.

*Note: This is an edited version of an article written for the April/May 2012 edition of Retirees Newsletter, published by the State University of New York (SUNY) Retirees Service Center. Janette Brown is Executive Director of the USC Emeriti Center and Emeriti Center College as well as Executive Director of the non-profit organization, AROHE.*





## The 20<sup>th</sup> Annual Conference & General Meeting of the Big Ten Retirees Association

By John R. Meyer, AROHE Board

In 1992, representatives of the retiree associations of the “Big Ten” universities, gathered at Ohio State

University to be hosted and formally organized as an Association. Twenty years later an enlarged (Big 12) membership including: Iowa, Illinois, Indiana, Michigan, Michigan State, Minnesota, Nebraska, Northwestern, Ohio State, Penn State, Purdue, and Wisconsin, held their annual conference and business meeting at the newer Blackwell Inn and Convention Center in the School of Business complex, Ohio State University, Columbus, OH, on August 3-5, 2012.

These retiree associations were founded between 1947-1983 and have convoked 20 annual meetings to share collective wisdom. They have large memberships, various states of financial support and institutional cooperation, and articulate similar activities and challenges expressed in this year’s theme: Growth and Development of University Retirees Associations.

The opening Friday banquet reception was at the large Tudor residence of and sponsored by the very popular OSU President, E. Gordon Gee. His staff of “ambassador” students, entertainers, and chefs and his circulating table talk were outstanding.

A series of two person panels led by third person commentators began Saturday and continued into part of Sunday morning. Below is a brief outline. You may browse the Big Ten Retirees Association website for the details.

### **(1) Enhancing Membership: What are effective strategies for recruitment of new members?**

The discussion detailed beneficial links with Human Resources, Development Offices and Alumni Offices for support for mailings and invitations, outreach before candidates retire and including information in pension or benefits package information. Donating was discussed as providing leverage and good will.

### **(2) Programming-What works?**

This session highlighted success in the areas of monthly lectures of relevance, travel groups, socials, initiatives of committees, energetic leadership, support from institutional resources, volunteer opportunities and having luncheon/dinner series. Also noted was the importance of life-long learning courses, recognition awards, offering scholarships for students and endowments to the institution to promote retiree profiles and contributions.

### **(3) Three Discussion Groups: Financial and University Support.**

Here we learned that support came from a variety of sources and that membership fees often followed from the offering of a complimentary first year. Support may be in the form of clerical, printing, mailing, and copying assistance from various campus offices. It was noted that transparency and value-added funding was necessary.

### **(4) Effectively Communicating with Retirees:**

Challenges are in the areas of updating websites and finding effective channels of communication, preferring personal opportunities such as volunteering. Seeking interns from Communications/Study departments for assistance in context and design was suggested. An OSURA survey indicated the following effectiveness of various media:

Newsletter= 74%	E-mail =52%
Website = 35%	Meetings/events = 36%
Social media websites: 47% *	

\* 81% “do not intend to use any of the five social media links”.

The event included a tour of some of the excellent facilities followed by a reception and banquet at the Faculty Club. Dick Hill, former Dean of Faculty of Ophthalmology and a dedicated retiree executive member of OSURA, treated the group to an informative analysis of the Columbus humorist author, James Thurber’s productively while impaired with eye damage from childhood.

I was given the opportunity to introduce myself and AROHE and raise two questions and their responses:

### **Why does AROHE need and have BIG (12) retiree associations?**

- to provide more data for survey and best practices data base;
- to provide more connections to national and international colleagues;

### **Why do YOU need AROHE?**

- opportunities for sharing in national and regional conferences;
- assistance in ADVOCACY for protection of pension and health benefits; resources from website, data bases, committees.

I encouraged all to take materials and join AROHE at least for one year. I wish to thank AROHE for the support and thank OSURA for the invitation and hospitality.



AROHE Board Behind the Scenes

Continuing the Visibility Campaign:  
Retiree Associations and AROHE

What Does AROHE Do?

What Excites Me Most About the  
October Conference?

IN THIS EDITION

October 21-24, 2012

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