

# The Next

## President's Message

## Chapter

### Association of Retirement Organizations in Higher Education (AROHE)

March 2007



#### **In this Issue ...**

- ❖ The President's Message
- ❖ Spotlight on CURAC (College and University Retiree Associations of Canada)
- ❖ AROHE Conference Recap
- ❖ A Solution to Complexity: Collaboration

In this issue of the newsletter, we spotlight our sister organization, CURAC (College and University Retiree Associations of Canada). Historically, I am told, we owe a debt of gratitude to our northern neighbors. The groundwork for AROHE and CURAC was laid at a biennial international conference on retirement in higher education that was largely organized by UCLA and the University of Southern California (USC). Had representatives from Canada not been present at those early conferences, and at the past three AROHE conferences, we could not have legitimately called the events international.

Of course our Canadian colleagues have meant much more to AROHE than their international credentials. They have been our helpmates and collaborators in defining the work and scope of what our national organizations can do to assist campus associations and centers, both programmatically and politically.

As we move forward this year, our hope is to provide more value-added benefits to AROHE membership. We have expanded the geographic representation on our board in hopes of working regionally as well as nationally. We plan to explore membership reciprocity throughout our network and identify what campus-based retiree organizations exist and learn more about their organizational structure and activities. In addition to our biennial conferences, we hope to institute technical assistance conference calls for our forming members and best practice conference calls for all. If you have any other thoughts or ideas about what AROHE can do for its membership, please do not hesitate to contact me or one of the AROHE board members.

One of AROHE's greatest assets is the opportunity it provides for collaboration with other members who can help bring your start-up organizations to fruition, enrich your current organization or with whom you can invent new avenues of participation. By collaborating nationally, and internationally, we add credibility and strength to our individual organizations. I look forward with excitement to our work together.

Shelley Glazer  
UC Berkeley

## Federation CURAC: History, Issues, and Relations with AROHE



Our federation, CURAC (College and University Retiree Associations of Canada), is the Canadian sister-organization of AROHE. We Canadians are proud to be contributing to AROHE's proper claim to be an international association of academic-retiree member institutions. Indeed, it was the successful example of AROHE which inspired our founding President Peter Russell to organize support for the creation of

CURAC—and to help shape it somewhat in AROHE's image. I'll describe CURAC, its members, organization and activities, and its goals—very similar to AROHE—though I'll try to suggest how we differ from you. Finally, I'll try to argue for areas in which CURAC and AROHE may profitably expand our fraternal co-operation.

CURAC's member-institutions are organizations of retirees from over fifty academic campuses in every province across Canada, including virtually all major Canadian universities, and a number of multi-campus college federations, from BC to Quebec—there are an estimated 18,000 individual members in these organizations. Every CURAC member-organization declares a single delegate, with voting privileges at the AGM (Annual General Meeting.) Since our incorporation last year, our national executive board is now termed the Board; this consists of twelve members, elected every two years at the AGM, including the President, Vice President, Secretary, and Treasurer; as well as the Chair of the Local Arrangements Committee for the annual Conference, who sits *ex officio*.

In a second stage of our organization, we finished last year the creation of a set of Board Committees, to organize and provide continuity in pursuing our priority goals. Among these are the Standing Committees, including the Board Conference Committee; the Communications Committee (which among other things has begun to publish the CURAC Newsletter/Bulletin); the Nominating Committee; as well as Committees dedicated to Benefits and related legislation; Pension Benefits and Legislation; Healthcare Policy and Practice; Retiree Housing; Professional Support; and Aboriginal Education. Several Committees, not yet voted as Standing Committees, are beginning the tasks of pursuing some of our other priority issues. Normally,

the Chair of each of these Committees is (for obvious reasons) a member of the Board.

The recent accomplishments of these new Committees include such activities as a pan-Canadian university survey of (non-health, non-pension) benefits, and the identification of best practices in individual institutions relating to these benefits; expert sessions on pensions, pension funds and pension legislation, as well as on seniors' healthcare challenges as related to (Canadian) Medicare; the organization of medical insurance for the individual members of our member-institutions who could not otherwise obtain it; contacts with the four federal academic granting agencies to ensure that there is no discrimination against retiree researchers in their applications for grants—and for the creation of a new set of small research grants for retirees independent of the intra-university small grants for “actives”; and finally the development of a clearing-house for information on the growing incidence of North-American academic-retiree housing.

The AROHE Conference in Tempe last fall confirmed a communion of many ideas and issues between our two federations (I list the most important of these): the general emphasis on the strengths, experience and capabilities of university retirees, and the possibilities for making use of them, in the university and outside; elaboration of methods for greater co-operation with us by academic administrations, opening possibilities for our professional continuity, as teachers, researchers and administrators, and opening the possibility of developing administrative support for campus retiree (research) centres; support for the creation, organization and continuity of new retiree associations, and (naturally) their affiliation with the federation; concerns for retiree healthcare issues and health insurance. And at other federation conferences, I have also noted the

parallel interest in academic retiree housing; retiree benefits; and changes in legislation on pensions and retiree healthcare.

To summarize: the AROHE Tempe conference underlined for me that despite some clear differences between our two retiree federations, particularly because of different national post-secondary educational cultures and different federal health-benefits legislation and practices, nevertheless CURAC and AROHE share major goals and issues: generally, in benefits—health, pension and other; in retiree research and other professional continuity; and in material and psychological concerns in retirement. And as federations, we share in efforts to encourage the organization of retirees in associations and federations for the sake of communications, for the sharing of best practices, and for greater effect in lobbying. We conclude that even closer links between our two federations will be very valuable.

In Board meetings and open discussions at the Tempe conference, you American colleagues expressed a similar desire for closer links with us. For this reason, and because AROHE executives are very interested in knowing more about what Canadian university and college retirees are doing, we understand that AROHE's Board of Directors have decided in principle that they will be represented in CURAC's 2007 annual conference in Windsor next May: by sending a delegation to our conference. Of course we were delighted with this decision. The attendance of leaders of an influential US college and university retiree movement will enrich these CURAC meetings, and provide even stronger links. I'm firmly convinced that our two federations can learn a great deal from one another, as well as capitalizing on the strengths of scale of our combined memberships.

Howard Fink  
*President, CURAC*

## MARK YOUR CALENDAR!!!

**WHAT:** 2007 CURAC  
CONFERENCE

**WHEN:** MAY 23-25, 2007

**WHERE:** THE UNIVERSITY OF  
WINDSOR CAMPUS -  
FREED-ORMAN CON-  
FERENCE CENTER  
(WINDSOR, ONTARIO)

**WEBSITE:** <http://www.curac.ca/>

## Fall Conference Featured Themes of Creativity & Institutional Relations



Over 50 college and universities were represented at AROHE's third international meeting held October 13 to 15, 2006 in Tempe, Arizona. The conference theme was, *Building on Experience for an Innovative Future*. There were over 100 attendees that included representatives of AROHE's member institutions, spouses, invited guests, and organizations having an interest in academic retirees. The conference took place at the Holiday Inn Express, near the campus of Arizona State University.

The conference opened with a welcome from outgoing president Gene Bianchi of Emory University and newly elected president Shelley Glazer of UC Berkeley. Maria Allison, ASU Vice Provost and Dean of Graduate Studies welcomed attendees to ASU and spoke of the "New American University" revealing how ASU is preparing for the future and setting strategic directions under the leadership of new President Michael Crowe.

"The Paul Hadley Honorary Address" was given by invited speaker, Gene Cohen, M.D., Ph.D. Dr. Cohen is the Director of the Center on Aging, Health & Humanities and Professor of Health Care Sciences and Psychiatry at George Washington University. Dr. Cohen used wit and humor to share insight from his research and recent book, *The Mature Mind: The Positive Power of the Aging Brain*. Dr. Cohen debunked myths that associate age with mental decline, he demonstrated that positive changes in retiree mental processing take place with age, clarified the difference between diseases that affect the brain and normal age-related changes, and encouraged the audience to engage in actions involving creative processes such as writing, artistic skills, and humor that help to keep the mind active and growing.

An open forum followed that allowed attendees to learn of the many types of campus-based retiree organizations. A variety of organizations were described such as those in a formative state, to some who have existed for only a few years, to highly structured organizations in existence for more than 25 years. Some organizations had official recognition of their college or university administration, with others being independent and without recognition. Activities of the organizations ranged from meeting for lunches to those having diverse operations and on-campus facilities. Public, private, two- and four-year institutions were represented at the conference.

The relationship of campus-based retiree organizations to their institution was explored in a session titled, “Selling Your Organization to the Administration.” Discussion of panelist Judith Blucker, Executive Vice Provost Academic Affairs (emerita) Florida International University, and Ellen Switkes, Assistant Vice President Academic Affairs (emerita) UC Berkeley illustrated that there are no simple answers to gaining recognition of the administration and encouraged patience and perseverance. A third panelist, Linda Pearson, University of Indianapolis, discussed the use of program evaluation to document organization activities and increase visibility.

AROHE Board member, Tom Elleman, North Carolina State University, gave a presentation about the AROHE Start-Up Kit. The Kit, created by the AROHE Board of Directors, provides essential information and guidance about starting a campus-based retiree organization. Kits were distributed to those attending the conference and are available from the AROHE office.

The session “From Start-Up to Active Program: Case Examples” concluded the first day of the conference. Three recently formed retiree organizations were featured. Richard Jacob, Arizona State University; Cathie Logan, Winona State University; and Richard Stryker, Jerome Chertkoff, and Joseph Miller, Indiana University, explained how their respective retiree organization came into existence; the process of establishing the organization; and current activities, accomplishments, and challenges.

## ***Day Two***

Gordon Clark Ramsey, University of Hartford, opened the second day of the conference with a presentation titled “Pass the Parcel On.” Ramsey is the Executive Secretary of the University of Hartford Emeriti Association.

The session “Using, Training, and Retaining Volunteers” explored volunteerism and retiree organizations. Alan Kagen, University Retirees’ Volunteer Center at the University of Minnesota, described their unique approach to volunteerism and service. Kagen explained the center’s efforts were primarily focused on meeting on-campus needs for volunteers. Kagen characterized their approach as *episodic volunteerism* as their approach was to encourage participation via one-time commitments such as serving on moot court juries, participating in on-campus blood drives, and similar assignments of short duration. Monika White, President and CEO, Center for Healthy Aging explained the valuable role played by volunteers associated with her community serving organization. White explained her belief in giving relevant assignments, adequate training, and the necessity of recognizing and rewarding the contributions of volunteers.

Following lunch that included an interesting speech by ASU Professor of Economics Stephen Happel and a tour of the ASU Emeritus College, sessions resumed and addressed the topic of “Keeping Our Organizations Relevant.” Eddie Murphy, Director of UCLA Emeriti/Retirees Relations Center, and Richard Jensen, President, Council of University of California Retiree Associations, discussed characteristics of effective campus-based organizations such as having a mission, a vision, and a plan, and attending to evaluation, communication, and change. Later, Robert Scales, Robert Stallings, and Janette Brown, University of Southern California, discussed the technological advancement of their retiree organization during a presentation titled “Crossing the Digital Divide for Effective Communication and Organization Efficiency.” The presenters explained and demonstrated the use they are making of a database to help with mailings and to keep up-to-date membership lists.

### *Day Three*

The theme of creativity was again visited through a session titled “Using Our Talents in New Ways.” The session featured two presentations, one by Leonard Gordon, Arizona State University, and the other by Gene Bianchi, Emory University. Gordon gave a personal and touching account of his experience of writing a personal history as a participant in a collaborative project between the ASU Emeritus College and the Virginia Piper Writing Center on that campus. As part of the process of writing the personal history Gordon examined the historical and social context of meeting his future wife, their courtship, marriage, and later his grief following her death. He explained how participating in the project had been an enriching personal experience and enabled him to explore a style of writing unfamiliar to him.

Gene Bianchi, immediate Past President of AROHE, delivered the final presentation “AROHE and Creative Aging.” Bianchi, author of *Aging as a Spiritual Journey*, encouraged attendees to seek opportunities to experience creativity, learning, and exploration. Bianchi shared his view that such occasions do not have to be complicated or expensive; that everyday life offers many such opportunities if one is open to them.

Throughout the three days of the conference there were many formal and informal opportunities for conference attendees to meet and exchange ideas. Formal opportunities for exchange came in the form of lunches and open forums; informal exchange took place during coffee breaks, and while browsing the newsletters, brochures, and other information available at the Information & Exchange table. At the conclusion of the conference many attendees commented that they felt renewed, had

a broadened sense of purpose, and had gained new ideas and strategies to share with their retiree organization.

Linda Pearson  
*AROHE Board Member*

## **Collaboration Within the University of California for Emeriti and Retirees**



**Complexity & Collaboration:** A simple principle might be “as things get more complex, collaboration and communication must be enhanced.”<sup>1</sup>

**The Context:** The world of retirees and retirement is getting more complex. Individuals are expected to know more as the rules and assumptions for their economic and health-care issues are changing. Few observers would say that things are getting easier: pension reform, health care rules – both Medicare and private – and judgments about investment put greater responsibility on individuals to understand and to navigate these topics. The new complexity is accompanied by a new anxiety among retirees – fear of getting it wrong, or of missing the boat, or of being cutoff.

Retirees are living longer; and longer lives coupled with higher-than-inflation increases in health costs has put great importance on managing both the nature of and communication

about programs for retirees. New rules for accounting by public agencies for health benefits for the retirement years are alarming the general public. Those rules require the creation of a liability on the university's books sufficient to pay for future benefits if the university were to cease operating immediately. (You'll hear it described as GASB-44)

Managing the programs and communicating effectively with the anxious retirees require programs to be effective, affordable, and comprehensible. Retirees, unlike active faculty and staff, no longer live near or within the shadow of the campus where communication is much easier. The geographic dispersion of retirees adds greatly to the complexity.

**UC As An Example of Complexity:** Collaboration as a way of life for the University of California's retiree organizations in our relations with each other and with the university. There are councils for our 13 retiree associations (Council of the University of California Retiree Associations - CUCRA) and our 9 emeriti associations (Council of University of California Emeriti Associations - CUCEA) which collaborate in the conduct of their affairs. On-campus support centers for Emeriti and Retirees which advise not only retirees, but staff and faculty who are trying to organize their post-employment lives.

Fortunately, UC has common policies governing human resources, retirement systems, and medical coverage, yet over 40,000 annuitants and a similar number of dependents rely on communication to organize how their lives fit with UC's support systems.

This mix of organizations and offices requires a great deal of collaboration to avoid duplication and to enhance the effectiveness of each group.

Our collaborations have several foci

- the University to the individuals – over 40,000 annuitants
- the University to the organizations – over 33 associations
- the Emeriti/Retirees Office to individuals – over 13 locations, campuses, labs, etc.
- the Emeriti/Retirees Office to campus associations
- the Office of the President to the Systemwide associations
- the Systemwide associations to the campus associations
- the campus associations to individuals as participants and as volunteers<sup>2</sup>

Within this labyrinth of information and program flow there is a fair share of individuals who don't get it right or for whom the university's programs do not work effectively or as planned. That emphasizes the need for a way to sort out problems and to resolve them. At the campuses active employees (and to a lesser extent retirees) are served by a group of specialists known as "health care facilitators" who try to resolve problems. At the association level CUCEA and CUCRA have a 'joint benefits committee' – JBC – which considers and brings to the attention of the Office of the President general problems with programs and their implementation. Individual retirees can seek help from their campus Emeriti/Retirees Office or from the Office of the President.

Informing retirees has relied upon specific mailings to keep them up to date, but recently specialized newsletters for retirees have been added to those and the associations' newsletters. Also included in outreach have been the educational programs about investments and retirement planning which reside on the investments web site.

The previous two paragraphs show why collaboration is essential to reduce the spinning of wheels and the resolution of problems. It also shows how UC is putting great emphasis on assuring that retirees can manage their post-employment affairs effectively. UC has a great need for collaboration. We're working on making it more effective.

**(Footnotes)**

<sup>1</sup> An alternative might be to make things simpler, but that's not happening.

<sup>2</sup> Volunteer organizations require effective collaboration and communication, as well. If we had more space, we'd write a whole section on volunteer collaborations.

Richard W. Jensen  
*Chair of the Council of the University of California Retiree Associations*



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AROHE  
3715 McClintock Avenue, Suite 220  
Los Angeles, CA 90089-0191