

The Next Chapter

Association of Retirement
Organizations in Higher
Education (AROHE)

December 2008



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FROM THE PRESIDENT



AROHE's New President - **Barry Culhane** enjoying a moment on the USC campus!

Dear AROHE Colleagues,

Thank you for the privilege and opportunity to serve as President of our organization. I have had the honor to be with the founding group under the direction and mentoring of the great **Paul Hadley**. Paul's vision and passion to create the best organization of retiree organization in the world lives on through each of us.

From the mouth of the Cheshire Cat in Lewis Carroll's, *Alice in Wonderland*: "If you don't know where you're going any road will get you there." It has been a long and winding road, but one where AROHE has made great progress since its inception in 2000 when Dr. Hadley gathered a number of us together to propose a national 501©3 organization "To Advocate, To Educate, To Serve" faculty and staff retirement organizations in postsecondary institutions. While I took 2007 off to deal successfully with medical issues, I am pleased to be back. I follow **Gene Bianchi**, **Shelley Glazer** and **Janette Brown**, all of whom kept AROHE moving in the right direction.

I am excited to serve as President at this time, because I feel that AROHE is on the cusp of great things. With **Eddie Murphy** and **Janette Brown** as Co-Chairs and **Linda Pearson** as Program Chair and a tremendous effort on the part of the USC staff, we had a very successful biennial conference, the description of which is detailed in this newsletter. I

thank my friend, Eddie, who has steadfastly led the way to the completion of many excellent newsletters. I am confident of the competence of **Dr. Janette Brown**, our Executive Director, and the excellent family of USC professionals who made all AROHE members feel welcomed and valued this past October.

We are having valuable discussions about AROHE and how to move AROHE to the next level. We need to expand and strengthen our team in terms of our Board and membership and dream of destinations quite possible if we choose the right paths. Without sharing some assumptions and structural ideas at this time, let me share my Top 10 “Pie in the Sky” big ideas for AROHE:

1. AROHE becomes the national well-known brand for faculty and staff retiree organizations.
2. AROHE develops significant relationships/partnerships with AARP, TIAA-CREF, Fidelity, CURAC, government agencies, including the Department of Health and Human Services.
3. AROHE becomes the higher education partner organization of choice for other retiree organizations.
4. AROHE completes a strategic plan by August 2009.
5. AROHE surpasses \$250,000 for the endowment fund by August 2010.
6. AROHE member organizations sponsor four regional conferences in the United States (Northeast, Southeast, mid-America, Northwest, and Southwest) by October 2010.
7. AROHE expands its menu of services well beyond the start-up kit and survey.
8. AROHE generates \$25,000 in revenue to support the 2010 conference and increases the endowment fund.
9. AROHE develops an honorary board of nationally renowned individuals from higher education.
10. AROHE and The Library of Congress partner to create a higher education history project, capturing the illustrious careers of faculty and staff during the Golden Age of higher education.

These are goals to which we can attach performance outcomes and structure ourselves to achieve. After a great conference and I hope a strategic planning process to help us chart our course for the future, I believe, collectively, we can make AROHE the organization **Paul Hadley** and many of us envisioned almost a decade ago. Thank you for your continuing involvement and contributions.

All the best,

~Barry Culhane

Rochester Institute of Technology, NY



Conference co-chair **Janette Brown** officially opens the conference!

AROHE's 4th BIENNIAL CONFERENCE – A SUCCESS STORY!

University of Southern California (USC) campus was the setting for the fourth AROHE biennial conference which was held October 24-26, 2008.

For months, the conference planners were busily planning for this event. Negotiating hotel rates, updating website, sending out surveys, contacting universities and colleges, selecting menus, confirming speakers and panelists, creating agendas, choosing social outings, arranging off-site transportation, securing sponsorships, conducting “conference” calls, scheduling volunteers, identifying moderators, ordering “give-

aways” and gifts, stuffing conference tote bags, conducting on-site “walk-throughs,” designing break-out room layout, meeting with campus administrators, collecting bios and pictures - to name some of the details attended to by a very dedicated group of people. The co-chairs had set a realistic goal of 150 anticipated attendees and they were gratified with an outcome of 127 enthusiastic and active participants.

Something new: An offering of a single-day rate was established. This was attractive to local retiree organization members which enabled greater participation.

The informal start of the conference occurred on Thursday evening October 23rd for those attendees who arrived early. This welcoming reception was nicely attended and friendly conversation evolved easily. New connections were made and old acquaintances were renewed. Following the reception, some attendees retired to the conferences’ hospitality room for further discussion, while others sought solace in their rooms, and others traveled off campus for a bite to eat. There was an atmosphere of anticipation.

Subject matter leaders had early morning duty (7am) hosting resource tables on various topics; multi-institution retiree organizations, retired faculty, directors and leaders, retired staff, start-up organizations, education and creative programs and emeriti colleges.

The conference officially opened when co-chairs Janette Brown and Eddie Murphy walked to the podium sporting their respective institution’s shirts! The following two days were abuzz with various topics being discussed and presented in various formats.

The generosity of the USC Administration will long be remembered by the benefiting conference attendees. The elegant lunch provided on Saturday was one example.

The conference concluded with the election of Barry Culhane, Rochester Institute of Technology, as the new president of AROHE .

We all parted with great expectation and anticipation of the next AROHE conference which will be held at

Wesleyan University in 2010. Following is a sampling of the programming content we experienced.

~Eddie Murphy
UCLA



Co-chair **Eddie Murphy** giving opening remarks.



Conference Keynote speaker, **Helen Dennis** sharing her wisdom.

HELEN DENNIS, KEYNOTE AROHE CONFERENCE SPEAKER

Helen Dennis delivered the Keynote address in honor of AROHE founder, **Paul Hadley**, long time believer in life-long learning. Ms. Dennis is a specialist in planning for life beyond employment and outlined the positive aspects of regenerative retirement. Her presentation was given with gentle humor. Her

remarks were so well organized that she could present an outline to each member of the audience.

She made clear that “retirement” formerly meant stopping working with a pension in hand. Now it involves so much more as the demographics of longer life impacts economics. Only recently has industry realized that it is the senior citizen who has the financial ability to move the Market. Government entities and Universities will gradually follow this reckoning, though institutions are slow to change.

To live to be 100 one needs to avoid tragic ills, but beyond that she listed four markers for successful aging: keep a stress reduction personality, keep exercising, keep the brain stimulated, and keep a positive attitude. Exercise, she pointed out, is the most important part of diet. Successful aging involves attitude as much as health, and a charismatic personality will go far in moving life expectancy forward.

She concluded her remarks by urging we carry on the life-long learning legacy of **Paul Hadley** by keeping creative in our engagement with life. **Itzak Perlman** continued to play at a concert though one of his violin strings broke. She pointed to this as a model of “with what you have left.” Brain cells have been shown to regenerate but life style is 70% of successful aging.

We felt much enlightened by her positive talk.

*~Ruberta Weaver
USC*

EDUCATIONAL AND CREATIVE PROGRAMS

Saturday morning **Len Gordon** from Arizona State University moderated a panel discussing educational and creative programs for retirees. **Jerry Walker**, the director of the Emeriti College at USC, spoke about how the College facilitates the passage of accumulated knowledge of scholars to society through programs for the benefit of the college and general public. A program set up to promote the continuation of knowledge transfer to others is the Speakers Directory which has over 100 presenters in their roster with 300

or more topics available to speak to the community at large. Another program is Learning and Teaching Without Borders which is a result of retirees’ learning interests such as computer literacy, healthy living, technology or even a ceramics class.

Pat Dougherty, the executive director of the University of Washington Retirement Association, spoke about the results of an 18-month review of the existing programs in order to revitalize the association. The association found that there was great interest in retirement transitions and programs that looked into the changes that take place, smoothly or not, in anticipation of retirement, retirement itself, or long after retirement. She talked about the difficulties for newly retired faculty including their change in status – letting go of the role they used to hold on campus. She also included some advice on programs; charge for workshops and charge a double digit amount so people know that it is good. Bring an expert in; encourage others to come.

Barton Boyle, president of the University of Missouri’s Retirees Association, shared some of his successful creative retiree programs such as a lifetime learning program that teaches courses in areas of interest for an 8-week session in the winter and 4-week sessions in the spring, summer and fall. A Friday film festival was also a great hit with his association. These programs meet the social needs of retirees as their groups of friends and family begin to shrink.

*~Barbara Jenkins
USC gerontology student*

SESSION ON AROHE 2008

SURVEY:

WHAT WE HAVE LEARNED ABOUT RETIREE ORGANIZATIONS

The presentation of the survey results were reviewed by panel members: **Janette Brown, Ken Klein, Linda Pearson**. Audience discussion followed. Contributions by survey participants created an overview of retiree services in higher education internationally.

Ken Klein, Valparaiso University, completed over 370 phone calls to campus administrators seeking responses regarding their campus organizations operations included in the findings of the survey. Ken's efforts added depth and breadth to survey participation.

A report from University of New Mexico survey revealed that since no other campus in their state had a retiree organization, they have chosen to be affiliated with the state's "educational retiree organization" similar to the National Retired Teachers Association (NRTA) with lobbying power in the state.

Panel comments and responses during the discussion included the following:

- 1) AROHE member organizations provide care, nurturing and enrichment of the lives of their retirees.
- 2) Start-up of organization is led by administration or retirees themselves.
- 3) There is sharing of activities among faculty and staff retiree groups.
- 4) There are faculty retiree organizations whose representative has voting rights on the campus Faculty Senate, and retired staff presentation on another board representing staff.
- 5) Organization name reflects constituency: faculty, staff or alumni retirees, any or all.

Suggestions for future surveys included comparing peer institutions; public/private, size of institution (student enrollment), types of institutions (technical, 4 year college, research, medical, etc). The survey results are scheduled to be available on the AROHE password protected website for AROHE membership.

~Harriet Service
USC

SAVE THE DATE!

What: AROHE Conference

Where: Wesleyan University Campus
Middletown, Connecticut

When: October 16-19, 2010



Retirement Center Directors L - R : **Cathie Logan**, Winona State University, **Jeri Frederick**, University of California, Irvine, **Eddie Murphy**, University of California, Los Angeles and, **Pat Dougherty**, University of Washington

RETIREE ORGANIZATION DIRECTORS PANEL

The panel's participants spoke about ways in which their retirement centers related to four groups: university/college administrators, retiree associations, emeriti educational organizations, and individual retirees.

- 1) Each of the panel's participants had developed strategies for interpreting their organizations to university/college administrators and for securing their cooperation. Because the development of retiree organizations is not always viewed as an urgent priority, directors need to be proactive and vigorous in nurturing relationships at multiple levels of university/college administrative offices.
- 2) Directors agreed that they often experienced a problem in interpreting, in easily understandable ways, the identities of their complex organizations. What is the relationship, for example, among emeriti centers, emeriti educational organizations, and retiree organizations? The problem is one of "branding."
- 3) The directors agreed that their small staff often carried heavy administrative loads, but that they needed to understand the importance of simultaneously creating "welcoming and comfortable" environments for retirees.
- 4) One of the directors emphasized the importance of regularly and systematically

evaluating the adequacy of benefits made available to retired faculty and staff.

~John Orr
USC

STARTING A RETIREE ORGANIZATION

Friday afternoon **Karl Scheibe**, the director, and **Bill Wasch**, an advisory board member, spoke on behalf of the Susan B. and William K. Wasch Center for Retired Faculty at Wesleyan University. They gave the audience some great ideas for starting a retiree organization by telling how they started the Wasch Center from the ground up with the help of a generous donation from Susan and William Wasch and contributions from other faculty members and alumni.

Bill Wasch presented an excellent slideshow of the process of remodeling a building for the use of the Center. Pictures were shown of named rooms in the Center that were in honor of major contributors and professors such as the Kay Butterfield meeting room and the Burton Hallowell foyer. The addition of an elevator to the finished attic and second floor made it possible for retired faculty to be assigned to the four second floor double offices and the five third floor private offices.

With the limited office space, the question was asked, “How do you decide who gets to use this space?” **Karl Scheibe** and **Bill Wasch** had a criterion for faculty and members to be assigned to these spaces; they must be actively contributing to some part of academia and make a presentation of their work at one of the Center’s Wednesday speaker sessions. If there was more demand than space, a faculty not utilizing the space would be kindly asked if someone more actively involved in a project could use the space; it was stated that the faculty or member would be happy to reallocate the space because they knew that they were not making use of the space.

After their story, the audience felt eager to start such a center at their own university.

Barbara Jenkins
USC gerontology student



Roger Anunsen; the featured speaker at the elegant USC Emeriti Center 30th anniversary luncheon!

BRAIN HEALTH AMBASSADORS PROGRAM

Dr. Janette Brown introduced **Roger Anunsen**, creator of *MemAerobics*. The *MemAerobics* programs and courses incorporate Anunsen’s “hands-on” experience. Anunsen has studied elders and engaged aging minds with the latest breakthroughs in neuroscience. His non-computer cognitive intervention programs have been jump starting older brains since 2000. He indicated 95% of what we know about the brain is from studies in the last 30 years.

Anunsen admonished attendees to keep the brain active by learning new things. Emphasis is placed on neuro-protective strategy: learn every day. Keep engaged to prevent cognitive decline. Mature minds reach conclusions easier and are more creative. The brain is a better problem solver after the age of 50. It is unknown if the brain ever peaks.

He recommends that retiree organizations desiring growth need to offer lectures that explain how to keep the brain healthy.

Hope Springs Internal – improve memory and believe in yourself; “I’m going to be here tomorrow.”

If you have a passion about something...just do it. Ethel Andrus started AARP at age 73. **Think Positive** - with positive thinking, we live 7 ½ years longer than others.

Anunsen emphasized the importance of socialization. Don't isolate. Improving your brain by "smidgens" every day; keeps it active. Challenge the brain: don't write things down.

Following his presentation, Anunsen was called back to the podium to give his personal testimony. He received undergraduate degrees in political science, business and economics. After earning his Juris Doctor (JD) degree, Annusen practiced law, authored articles on family farm law, led litigation efforts on behalf of wildlife and served as co-chair of the Oregon Medical Association; Oregon State Bar Legal-Medical Committee.

Stricken with what is now understood as "Professional Burnout," Anunsen left the legal profession and began a career in the field of aging and memory inspired by the residents he met during his four years working as a full-time activity director in assisted living facilities.

The rest is history!

~ Lora Walker
USC

TRENDS IN LIFELONG LEARNING AND HIGHER EDUCATION AS THEY AFFECT RETIREE ORGANIZATIONS

(Excerpted from a presentation made at AROHE's 4th International Conference October 24-26, 2008, University of Southern California, Los Angeles)

Five major trends are influencing retirement organizations in higher education, college campuses, and communities. These trends are occurring as the

increase of the older population becomes a *reality* rather than a *projected* event. It is well known that the older population is expected to grow significantly over the next ten to twenty years. This growth is in two large segments of the older population; the young old, those in the Baby Boom generation and the older segment, those who will live into the 80th and 90th decade. This large and more age diverse segment of the population is gaining attention and changing and challenging long held views of retirement and old age.

Trend #1: A strengthening connection between older adults and higher education. There are several indicators for this trend of which a report, *Framing New Terrain: Older Adults and Higher Education*, is the most relevant. A subsequent report, *Mapping New Directions, Higher Education for Older Adults*, was recently released. The reports are published by the American Council on Education (ACE) and the MetLife Foundation as part of their joint effort, *Reinvesting in the Third Age*. The reports are available at: www.acenet.edu/cll/reinvesting.

The reports can be useful to AROHE organizations in that they substantiate the increasing relationship between older adults' and higher education and are written to the higher education community. While much attention is given in the reports to the needs of older adults regarding employment skills; relevant information is provided concerning needs, obstacles, and issues related to lifelong learning for personal fulfillment. Existing programs that serve older adults are identified. Overall, the reports encourage higher education institutions to examine policies and practices regarding older lifelong learners. It is worth mentioning that several of the efforts and challenges noted in the reports are consistent with findings of the AROHE survey.

Models and programs being used by AROHE organizations that reflect this trend include those at Arizona State University <http://www.asu.edu/provost/emerituscollege/eccenters.html> and Emory University <http://www.emory.edu/emeritus/>

Trend #2: The need and desire of some older adults to be employed or productively engaged during retirement. This sounds ironic doesn't it?

You retired to get away from work! However, due to financial need for some and a source of fulfillment for others, many older adults want to include paid employment in their retirement lifestyle. This employment often takes the form of part-time work or finding uses for professional and career skills. For still others retirement offers the opportunity to pursue a new career or job skills. This trend is recognized in the concept of second careers, phased retirement, and specialized employment programs for older adults. Examples of the trend within AROHE are programs such as University of California-Berkeley's *Retiree Work Opportunity Program* <http://thecenter.berkeley.edu/> and University of Southern California's *Trojan ENCORE Work Opportunities Pilot Program* http://www.usc.edu/org/emeriti_center.

Trend #3: Service and Volunteerism. Of course some retirees may want to be productive yet not engage in paid employment. In fact, older adults are an increasingly important component of the volunteer labor force. Specific to college and university campuses, is the effort of many institutions to serve the local community through civic engagement, community service and service learning projects. Models of this trend being used by AROHE member organizations include the Volunteer Office of the University of Minnesota Retirement Organization, <http://www1.umn.edu/umra/volunteer.html> and the Retirement Resource Center at the University of California San Diego <http://www-hr.ucsd.edu/retire/VolunteerBrochure-blue.pdf>.

Though civic engagement and service learning are student focused they often welcome the involvement and support of retired faculty and staff. A source of information about projects of this type is the National Campus Compact at <http://www.compact.org/>. An excellent resource on volunteerism and service of older adults is The Corporation for National and Community Service a program of the federal government. Information about the Corporation is available at www.nationalservice.gov. Particularly relevant is their recent report, *Keeping Baby Boomers Volunteering*, a critical and in-depth look at Baby Boomers as volunteers.

Trend #4: The emerging concept of positive aging. Positive Aging is a belief or view of older adulthood as a time of involvement, creativity, contribution, and self-growth. This view recognizes formal retirement as a transition to a new phase of life rather than as an ending. The Positive Aging approach is concerned with possibility and prevention and is evident in many programs presented at the conference such as Helen Dennis' *Project Renewment* <http://www.projectrenewment.com/>; James Birren's *Guided Autobiography Program*, www.guidedautobiography.com; and Roger Anunsen's *MemAerobics* brain health program <http://www.memaerobics.net/>. An example at the national level is the 2nd Annual Positive Aging conference, *Achieving Purpose, Meaning and Vitality in the Second Half of Life*, held in November at the University of Minnesota.

Trend #5: An increase of retirement communities and senior housing especially those located on or near college and university campuses. This is not so much a new trend as an increasing trend. It is evident that cities and developers are responding to the increasing need for senior housing. Nearby college campuses, rich in resources of education, culture, entertainment and human talent complement the attractiveness of this type of housing. This growth brings increased opportunities for service and partnerships to higher education retirement organizations.

Examples of this trend within AROHE include retirement housing options available to retirees of the University of Washington <http://depts.washington.edu/retiremt/uwra/housing.htm> and a new development near UCLA, <http://www.seniorsforliving.com/community/Belmont-Village-of-Westwood/>.

CONCLUSION

These five trends are impacting retirement organizations in higher education, college campuses, and surrounding communities. Awareness of these trends can be useful in helping your retirement organization address the interests and needs of your members and institution. Understanding current interests and efforts can assist in making your

organization a vital and relevant part of the institution. It is likely that more than one program or organization will exist on a campus that targets the retirees of the surrounding area and little doubt that this increased activity will bring both competition and opportunity for involvement and collaborative partnerships to AROHE member organizations.

*~Linda M. Pearson, Ph.D.
University of Indianapolis*

UNIVERSITY AFFILIATED RETIREMENT HOUSING PANEL SUMMARY

Eddie Murphy (UCLA) led this panel with presentations by **Patricia Will** (Pres., American Senior Housing Association and CEO Belmont Village Senior Living), **Frank Rees** (Pres., Rees Associates), **Richard Mazza**, (VP, Business Development and Planning, Pacific Retirement Services), and **Adrian Harris**, (UCLA Vice Chancellor Emeritus). Will's organization is involved in 18 such projects (10 in California). Two of these are now under construction; one in Westwood near the UCLA campus. Rees's organization has been involved in 42 projects in 24 states. Mazza's (nonprofit) has been involved in a number of "Mirabella" projects in Seattle, Portland and San Francisco Bay (Foster City).

There is extraordinary diversity among these projects (units for sale, for rent, including textured options of assisted living or more intensive care, with a huge array of different amenity structures). They share the business plan of a college or university providing some combination of land/access/continuing support in partnership with the private or nonprofit developer which provides the capital (from such sources as J.P. Morgan- Chase, GE, CalPERS, Freddie Mac, etc.), as well as design and construction. Such projects are desirable opportunities for developers that assure a positive intellectual environment to their participants, a variety of healthy living choices, the home-court advantage of working with an already-established affinity group, and support for the sponsoring universities.

There is a robust development of projects in a wide variety of college and university communities. They increase the academic vitality of a college or university community while minimizing the use of the financial resources of the sponsoring institution, and do so in ways found advantageous to those living in them. It is not clear whether current U.S. financial difficulties will constrain the amount of financing available to developers for future projects, but there is widespread and broad support for their continued development.

*~Robert Biller
USC*



Karl Scheibe and Bill Wasch hosts of the 2010 AROHE Conference which will be held at Wesleyan University.



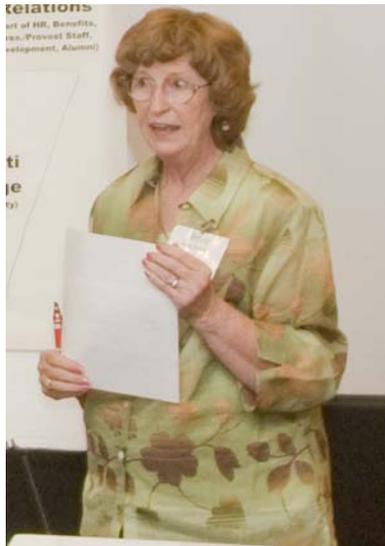
Our thanks to the dedicated USC Emeriti Center Staff (Front Row, L-R **Gloria Reyes**, **Geri Toscano** and **Maricela Rojas**. Back Row, L-R: **Chris Curry** and **Judy Diaz**.)



Top L-R: **Mitzi Tsujimoto, Janette Brown, and Roger Anunsen.**
 Bottom L - R: **Elizabeth Birren, Dr. James Birren, and Linda Pearson.**



Compliments of the USC Administration, all conference attendees enjoyed a delectable lunch at the Town and Gown venue.



Betty Redmon, (USC) Panel Moderator.



Presentation of gift to **Bob Stallings, USC** for his maintenance of the AROHE website.



Alive to Thrive panelist, **John Meyer** giving the College and University Retiree Association of Canada perspective.



A very memorable presentation by **Bobbie Lubker, University of North Carolina at Chapel Hill.**



Our wonderful volunteers welcoming guests at the registraton table. (L - R: **Gloria Reyes, Barbara Jenkins, Jo Ochoa and Roslyn Haley**).



Autobiography break-out session led by **Dr. James Birren and Cheryl Svensson**.



Co-chairs **Brown and Murphy** at the podium.



Bob Stallings assisting conference attendee with special demonstrations.



Bobbie Lubker (UNC-CH), James Saunders, University of Pennsylvania, participate in the Alive to Thrive panel panel.



Patricia Will, Founder and CEO of Belmont Village Senior Living discusses the senior housing market.



Conference attendees walking to the USC Emeriti Center 30th anniversary luncheon.

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