

START UP AND DEVELOPMENT KIT

HOW TO START, BUILD AND MAINTAIN AN
ACADEMIC RETIREMENT ORGANIZATION

AN INTRODUCTION



AROHE
ASSOCIATION OF RETIREMENT ORGANIZATIONS IN HIGHER EDUCATION
[HTTP://WWW.AROHE.ORG](http://www.arohe.org)

AROHE Start-Up and Development Kit

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Introduction

AROHE advocates for, educates and serves college/university-based organizations for retired faculty and staff. By promoting a culture that values and encourages retirees' continuing contributions to campus and community life, AROHE helps colleges and universities to harness the remarkable talents of their retirees to further the missions of their institutions. With ever-increasing life spans, the majority of today's retired individuals lead very active and productive lives.

As one retiree said in a recent survey, she is “retired from working but not retired from living.” This comment reflects the sentiment of other college and university retirees, many of whom devoted 20 to 50+ years to their careers. For them, retirement is not a disengagement from their institutions of higher education; rather it is a shift in the relationship. They want to stay involved and engaged.

Colleges and universities have discovered that a relatively minimal investment can pay off in great dividends from this often-untapped resource. Organizations such as retired faculty/staff associations, retirement centers or emeriti colleges encourage retirees to become more involved with activities such as teaching, mentoring, researching, serving on task forces and committees, acting as docents, raising scholarship funds, contributing financially, advocating for their colleges/universities and otherwise sharing their time and talents.

The most recent triennial surveys of University of California retired emeriti faculty and staff, for example, show that:

- More than 50% of emeriti faculty who responded to the survey were still teaching.
- More than 60% of retired staff respondents were volunteering in the community; 20% were volunteering on campus.
- More than 40% of emeriti faculty respondents were mentoring students and more than 50% were receiving extramural funding.
- More than 60% of emeriti faculty respondents and more than 25% of retired staff respondents were providing one or more professional services.

AROHE members can view the most recent University of California survey reports on the AROHE website in the “Surveys and Reports” section of the Resources web page.

Retired faculty and staff want to lead purposeful and productive lives and colleges/universities, especially in uncertain economic environments, can always use additional support. Retirement organizations such as retirement associations, retirement centers and emeriti colleges are effective means to serve the interests of, and provide mutual benefits to, both the institution and its retirees.

The Start-Up and Development Kit

Establishing a new retirement organization or revitalizing/maintaining an existing organization can both be daunting tasks. AROHE has developed this Start-Up Kit as a resource for retirees and campus administrators who wish to embark on these efforts. The kit is primarily geared toward those who are developing new organizations but the information applies to established organizations as well. This document compares and contrasts the three primary retirement organization types—retirement associations, retirement centers and emeriti colleges. It also gives links to resources and outlines keys to success for those establishing or developing such organizations.

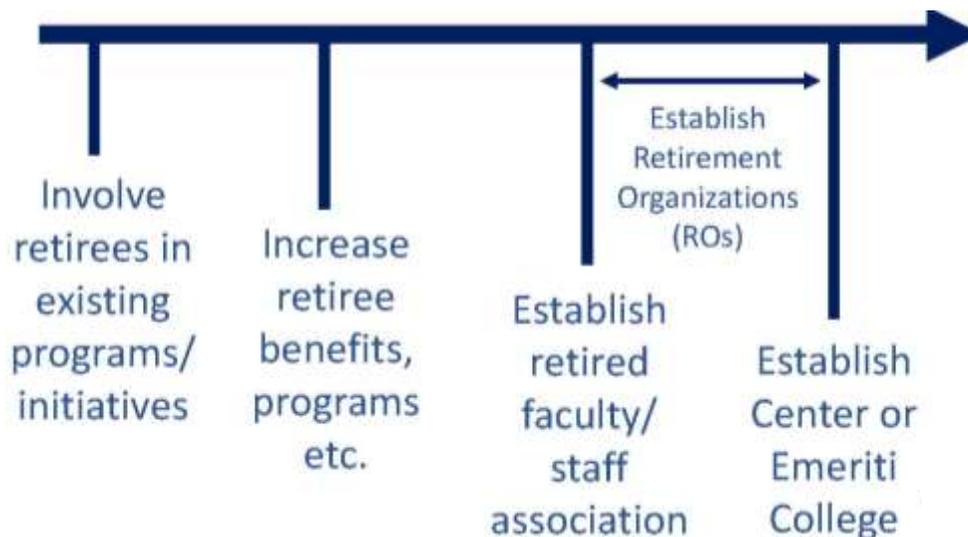
When establishing a retirement organization, there is no single path to success. Some organizations are created from the “bottom up,” where interested retirees do the work, while other organizations are developed “top down,” by senior campus administrators who take the lead in the organization’s creation. Some organizations have acquired a considerable measure of stability with assigned office/activity space and paid employees while others are much more “shoestring” operations.

Some organizations serve only retired faculty and some serve only retired staff; some are umbrella models guided by a common administrative body and still others serve all retirees from their institutions. Funding sources, range of activities, services offered and organizational structures differ widely across institutions.

This Start-Up Kit includes information and links to resources from AROHE member organizations throughout the United States and Canada. By pooling common experiences and sharing “successful practices” from a variety of institutions and organization types/sizes, AROHE hopes to simplify the task of creating a new organization and provide resources to help existing organizations grow and thrive.

Continuum of Retired Staff and Faculty Support

Colleges and universities vary widely in the level of support and opportunities for connection that they offer to their retired faculty and staff. Models exist all along this continuum ranging from involving retirees in existing programs to establishing campus-funded units to serve all of the institution’s retirees.



Retiree Benefits and Privileges

Many colleges/universities offer some level of benefits and privileges to their retired faculty and staff. Retirement organizations can play an important role in advocating for, and preserving, these offerings. For the purpose of this document, benefits refer to vested or formal benefits such as pensions, retirement savings accounts and retiree health care benefits. Privileges refer to such items as parking permits and email continuation. While not an exhaustive list, the following are some benefits and privileges that are typically offered to retired faculty and/or staff:

- **Defined contribution or defined benefit retirement plans** – Increasingly, colleges/universities are moving away from defined benefit plans toward defined contribution plans.
- **Retiree health care plans** – This is becoming an increasingly rare retiree benefit.
- **Parking passes** – Often one of the most coveted retiree privileges, institutions may offer free or reduced parking passes to their retired faculty and/or staff.
- **Email continuation** – Many colleges/universities offer continuation of institutional email to retired faculty and senior-level administrators. Some institutions offer email continuation, or complimentary email forwarding services to retired staff as well. Sometimes staff have to pay for email continuation. Some retirement organizations sponsor the continuation of retiree email as a service to their constituency.
- **Retiree ID cards** – Many colleges/universities offer retiree ID cards and retirement organizations often collaborate with the campus ID card office to provide these cards.
- **Library privileges** – Many institutions give continued library access to retired faculty and/or staff. Access to online journals, however, is usually limited to retired faculty due to licensing agreements.
- **Office and/or lab space** – This privilege is typically offered to retired faculty and is at the discretion of the academic unit head. Office space is typically shared and lab space is usually only available to retired faculty who have active research projects.
- **Campus discounts** – Retirees may receive discounts (typically the same as active faculty and staff) at campus entities such as retail outlets and dining establishments and at campus events such as performing arts and athletic events.
- **Community discounts** – Some retirement organizations negotiate discounts with local businesses.

Types of Retirement Organizations

As institutions move along the continuum of retiree support, the interest in establishing a retirement organization sometimes increases. The three primary types of retiree organizations—retirement associations, retiree centers and emeriti colleges—vary in structure and provide sometimes overlapping programs and services. While some colleges/universities adopt a model that falls somewhere between the three types of organizations outlined in this kit, the majority fall within the general descriptions below.

Faculty/Staff Association	Retiree Center	Emeriti College
<ul style="list-style-type: none"> • Unique entity but affiliated with university • Similar to Alumni Associations • Membership-based • Usually primarily dues-funded; sometimes partially campus-supported 	<ul style="list-style-type: none"> • Office of record for retirees • Usually not membership-based; serves all retirees • Often provide administrative support to retiree associations • Campus-funded 	<ul style="list-style-type: none"> • Scholarship & research focused • Usually serves retired faculty only • Usually hybrid funding: campus funded, endowment, foundation, membership/fee-based

The next several sections of this Start-Up Kit will compare and contrast each of the three types of organizations and offer considerations for the formation of one type or another.

Retirement Associations

Retirement associations are typically membership organizations, similar to alumni associations, that are independent of, but affiliated with, their institutions. Associations usually serve as advocates for retirees, offer a variety of programs and services for their members and support their institutions through volunteerism and/or philanthropy. If you are unfamiliar with this type of organization, read Attachment A, “*AROHE Brief: Retirement Associations*,” before proceeding to the next section of the Kit.

Retirement Centers

Retirement centers are campus-funded units that act as official offices of record and “One-Stop Shops” for the college/university’s retired faculty and staff. The office may be called a Retiree Center, Retirement Center, Retiree Resource Center or some similar name. Regardless of the name, most centers have similar functions and programs. Centers usually have permanent staff, space and funding as well as a defined mission within the overall college/university mission. A few retirement centers are structured such that they serve the retirees of a college or university and offer lifelong learning programs to older citizens of the community. An example of this model is the Retiree Center at Winona State University in Minnesota. If you are unfamiliar with this type of retirement organization, please read Attachment B, “*AROHE Brief: Retirement Centers*,” before proceeding to the next section of the Start-Up Kit.

Emeriti Colleges

Emeriti colleges are college or university units established to promote the continued intellectual and social involvement of retired faculty members. Emeriti College activities and programs overlap with associations and centers; however, they tend to have a scholarly focus, typically offering such programs as colloquia, discussion groups, seminars and other intellectual pursuits. Emeriti colleges also may sponsor mentoring programs, living history projects or scholarly journals. If you are unfamiliar with this type of retirement organization, please read Attachment C, “*AROHE Brief: Emeriti Colleges*,” before proceeding to the next section of the Start-Up Kit.

Organizational Functions

The chart below briefly outlines the typical functions of each organization type.

	Association	Center	Emeriti College
Connects retired faculty/staff to each other and the campus	Primary	Primary	Primary
Advocates for retired faculty/staff	Primary	Some	Most
Offers educational workshops, scholarly activities	Most	Some	Primary
Offers social programs	Most	Most	Most
Facilitates opportunities for teaching, mentoring, service	Some	Most	Primary
Serve as office of record for retirees		Primary	
Coordinates legacy projects	Some	Some	Some
Offers research stipends	Some	Some	Some
Offers retirement preparation classes	Few	Most	Few

Organizational Structure

For organizers who are establishing an entity from scratch, it can be challenging to decide which type of retirement organization will best meet the needs of the institution and its retirees—a retirement association, a retirement center, an emeriti college or some hybrid model? Retirement associations are usually the first organizations to form at a college/university; some campuses, however, start with, or only develop, retirement centers or emeriti colleges. Developers of new organizations should consider several factors to determine the type of organization best suited to their institution, as outlined below.

Ease of Formation

As mentioned, a retirement association is typically the easiest type of retirement organization to establish. An association can be as simple as an informal group that gathers periodically for social events and/or provides support to the college/university. It can start small and grow in complexity. It can

be established with no institutional support if necessary. On the other hand, retirement centers and emeriti colleges require a significant investment by the institution. The majority of retirement center and emeriti college organizers have found that it can take several years as well as persistent, ongoing effort to form one of these types of organizations.

Membership

One of the first items to consider is whether or not your organization will be membership-based. Most retirement centers serve all retirees from their institution without requiring membership, whereas most retirement associations and emeriti colleges use some form of a dues-based membership model. For the entities that utilize a dues-based model, dues usually constitute their primary source of revenue. For membership-based organizations, eligibility is determined by the organization, and may include some combination of any or all of the following retirees from the institution:

- Faculty
- Academic researchers
- Librarians
- Administrators
- Staff at all levels
- Spouses/partners of retirees and/or deceased retirees

In addition to retirees from the institution, some associations offer membership to other s, such as:

- Academic retirees from other colleges/universities
- Current faculty and/or staff
- Others as determined by the association

Those trying to establish new retirement associations often inquire as to the number of members an association can expect to obtain. This varies, but in general, 10 to 20% of eligible retired staff will join an association and 35 to 50% of eligible retired faculty will join their association. The greater the number of tangible membership benefits the association can offer, the more members it will attract.

Some retirement associations use a “universal membership” model, whereby all retirees from their institutions are considered members. These associations generate revenue from sources other than dues. Some associations, including the University of California, Berkeley Emeriti Association, upon changing from a dues-based model to a universal model, have collected more revenue from asking for donations than they previously collected in dues.

Revenue/Funding Sources

As shown in the chart on the next page, there is considerable overlap in revenue/funding sources for all three types of organizations, but the primary sources typically differ. Most retirement associations, as mentioned, receive the majority of their revenue from dues. They may also collect a significant amount of revenue from events such as social gatherings and trips and they may obtain some funding or in-kind staff support from their institution. Retirement centers and emeriti colleges typically receive the majority of their funding from their colleges/universities, but many also rely on a variety of other sources of income. All of the entities may organize fundraising drives or solicit sponsorships from businesses, both of which can be major sources of revenue.

Funding Comparison Chart

	Association	Center	Emeriti College
Campus funding	Occasional	Primary	Primary
Revenue (events, services)	Secondary	Secondary	Secondary
Partnerships / sponsorships	Tertiary	Tertiary	Tertiary
Dues	Primary	N/A	Secondary
Association contributions	N/A	Occasional	Occasional
Fundraising	Occasional	Tertiary	Tertiary

Institutional support

The strength of a retiree group is often directly proportional to the financial assistance provided by the institution and the interest shown by senior academic officials. As mentioned previously, retirement centers and emeriti colleges typically receive the greatest amount of institutional recognition and support. Retirement associations receive varying degrees of support, ranging from none to substantial.

Structure within the Institution

As campus-funded units, retirement centers and emeriti colleges are an integrated part of their college/university. Centers are typically housed in one of four departments—alumni affairs, development/advancement, human resources or academic affairs. Emeriti colleges are usually housed within academic affairs. Retirement associations, while they maintain their separate identity, usually have a liaison staff person, and often some level of support, from one of these four departments.

Space

It is common for both retirement centers and emeriti centers to have dedicated office and/or event space. The amount of space may vary from a small office to a suite of offices to a small freestanding building. Event and meeting space often has to be rented or shared with other campus entities, such as alumni relations departments, faculty centers or academic units.

Retirement associations may or may not have assigned office space on campus. In addition to office space, associations may be offered free use of conference rooms for meetings and may be given access to event venues at no cost or at a reduced rate. Many fledgling associations advocate early in their development for assigned space on campus, even if it is just a small office. An office with a sign on the door legitimizes the association in the eyes of many campus administrators and can be the beginning of increasingly more support from the college/university.

The quest for space is often a slow process that requires much tenacity and demonstration to the college/university that it is receiving a solid quid pro quo. Some retirement organizations have experienced success by writing a formal proposal for space. See an example from UC Davis on the AROHE website in the “Organization Documents” section of the Resources web page.

Staff

As previously mentioned, retirement centers and emeriti colleges usually have paid staff, ranging from a part-time coordinator to two or more full-time staff persons as well as student employees. Retirement associations are characteristically all-volunteer organizations, but many institutions provide some amount of staff or student administrative support to their associations. Like the request for space, the request for staff support usually requires a solid proposal that shows a benefit to the college/university for funding such a request.

Technology

Efficient technology solutions streamline operations for all types of retirement organizations. As campus-funded units, retirement centers and emeriti colleges typically have use of the institution’s technology resources and staff. Retirement associations, because of their independent status, may have to advocate for institutional technology support. Many campuses provide the following supports for their associations, and new organizations will benefit greatly by advocating for such support:

- A institutional-related email address
- Use of campus email list serves, bulk email services or databases
- Website hosting
- Back-up and archival of records
- Software and updates such as the Microsoft Office suite that contains Word, Excel, publisher and similar applications.
- Access to technical support staff
- Access to training to help members stay current with computing software and skills.

Associations that are not able to gain institutional support for technology often establish a technology committee, recruiting retirees with a technical background to research and implement cost-effective technology solutions.

Additional Support

In addition to space and staff, retirement organizations may receive additional support from their institutions. Retirement centers and emeriti colleges typically receive annual budgetary allocations for these additional items. Many retirement associations advocate for university support for such items as:

- Office equipment such as desktop computers, laptops and telephone/data services
- Office supplies
- Newsletter printing and mailing services
- Event subsidies
- Travel to retiree related meetings such as the AROHE biennial conference. The AROHE conference website features a toolkit that provides templates and resources for associations who wish to request institutional support to attend the conference.
- Liability insurance

Advocacy

Another important consideration is the role the retirement organization wants to play in advocating for retiree interests, privileges and benefits. While all three types of entities do this to a certain extent, retirement associations are usually able to play a much stronger advocacy role due to their independent status. In fact, advocacy on behalf of retirees is frequently one of the most important functions of retirement associations.

Governance and Structure

Governance and structure varies significantly between the three types of retirement organizations. While the general structures of each type are outlined below, as mentioned earlier, individual organizations may not exactly fit into one of these models, or may be a merging of more than one model.

Retirement Centers

Retirement centers, by virtue of their status as campus departments, typically operate as any other campus department would, with a director or coordinator who is an employee of the institution reporting to a supervisor and with a permanent budget for staff and operations. Some centers utilize an advisory committee of retirees and/or current campus administrators. Retirement Centers often act as an umbrella organization for their campus' retirement association(s), providing administrative support for the association's activities.

Emeriti Colleges

Emeriti colleges typically are campus departments; however, due to their academic nature, they usually are directed by a part-time director who can be a current or retired faculty member. They may also have a board of directors or an advisory/steering committee. It is common for emeriti colleges to have permanent budgets for staff and operations.

Retirement Associations

Retirement associations differ significantly from retirement centers and emeriti colleges in terms of governance and structure. As independent organizations, they characteristically are governed by an elected board of directors which consists of officers (president, vice president, secretary, treasurer) and members-at-large as well as appointed committee chairs (such as membership, activities and marketing) and other positions such as a historian or archivist. If the college/university also has a retirement center, the center's director or coordinator often is an ex officio member of the board. If no retirement center exists, associations usually benefit from maintaining a close relationship with a liaison from the university, who may be an ex officio member of the board of directors. Typically, the more senior the university liaison, the better is the communication with, and support from, the institution.

Governing Documents

As campus departments, retirement centers and emeriti colleges generally develop purposes and goals that fall within the general missions of their institutions. They often develop annual business plans and/or periodic strategic plans to guide their work. AROHE members can view sample business plans and strategic plans on the AROHE website in the "Surveys and Reports" section of the Resources web page.

All three entity types can benefit from developing organizing documents in the beginning stages. During their formation years, retirement centers and emeriti colleges often follow guidelines in organizational plans. Except for the most informal groups, retirement associations usually have developed bylaws and/or operational/procedural manuals to outline the structure of, and operations for, the association.

These types of documents are extremely helpful for continuity in all-volunteer organizations. AROHE members can view sample organizational documents, bylaws and operational/procedural manuals on the AROHE website in the “Organization Documents” section of the Resources web page.

Additional Considerations for Retirement Associations

As independent organizations, retirement associations must consider some additional aspects of structure and development.

Leadership Team

The most successful new retirement associations develop leadership teams with diverse skills. Aside from retirees who are positively received and well-regarded by current campus administrators, organizing groups benefit from recruiting retirees who have specific skill sets, including some who are at ease with software programs such as Word and Excel, some who can work with databases and websites, some who are good planners and organizers and some who have “people” skills in attracting and attending to others.

Non-Profit Status

Some retirement associations apply to the IRS for federal nonprofit status. One of the primary reasons a group may wish to seek non-profit status is so that it can raise tax-exempt funds for scholarships or other philanthropic endeavors. As an alternative, associations can also partner with their institution’s foundation to raise funds without obtaining nonprofit status. Non-profit incorporation has ongoing tax and accounting implications, so those who are considering establishing a new retirement association as a non-profit or pursuing nonprofit status for an existing association should seek professional advice.

Access to Retiree Information

As the official office of record for their institution’s retirees, retirement centers typically receive names, contact information and other details about retirees from the human resources department on their campus. Emeriti centers may or may not have access to this information depending on their relationship with their college/university.

Retirement associations, because of their independent status, typically do not have access to this information due to the institution’s confidentiality regulations. However, associations may partner with their human resources department to reach retirees or those nearing retirement without compromising the college/university’s concerns with confidentiality. Some ideas for doing this include:

- Asking the human resources department to send a mailing to retirees on the association’s behalf, whereby the association pays and prepares the mailing and the department staff members affix the mailing labels and put the letters in the outgoing mail.
- Asking to staff retirement association informational/outreach tables, provide a brief overview of the association or sponsor a panel discussion at the institution’s retirement planning seminars.
- Asking to staff retirement association informational/outreach tables at employee events such as benefits fairs or other large employee gatherings.
- Asking departments to provide links to the association’s website on their departmental websites.
- Asking the institution or individual departments to include occasional articles about the association in their employee newsletters or other communications.

These are just a few ideas associations can use to reach retirees or future retirees. This task can take considerable effort and will be more successful if the association works to build and nurture a relationship with the campus' human resources department, perhaps by first volunteering to help with the department's events. With each outreach effort, associations should make it easy and desirable for retirees or future retirees to share their contact information so the association can build its database of retirees.

In many cases, colleges/universities do not track their faculty and staff after retirement, so there is no source for retiree contact information. In these instances, developing a database of retirees is much more challenging. The retirement organization may have to focus on connecting with new retirees using methods like those outlined above and use creative search techniques to build a database of past retirees. In these situations, a selling point for the establishment of a retirement organization could be the establishment of a retiree database, which could be very desirable for some campus departments, including alumni relations offices and advancement/development departments.

Recordkeeping

Retirement associations, due to their independent status, can find it challenging to keep financial records and historically important documents in such a way that they can be easily accessed, transferred as leadership changes and appropriately archived. Many associations utilize cloud-based internet services such as Dropbox or Box for this purpose.

Options for maintaining member databases can be equally challenging. Some retirement organizations use their own Excel or Access database (sometimes with university back-up capabilities). Some organizations are able to obtain permission to use a college/university-sponsored database, particularly in alumni relations/development/advancement departments or their foundation.

In addition, several vendors offer member-management software for small associations at a reasonable price. These systems can include web hosting, member record-keeping (including online transactions) and event management. All-in-one web-based systems such as this can ease the task of managing the business of the association, especially when association leaders are often working from their homes. Two companies that offer this service for small associations are Wild Apricot and Memberclicks. An internet search will find many other companies as well.

Communications

Most retirement organizations communicate with their constituencies regularly by methods such as:

- Email
- Website
- Social media
- Electronic bulletins
- Newsletters (either electronic or printed)
- Scholarly journals

Most retirement associations that have a direct connection to their college or university are extended at least minimal support that includes an institutional-related email account and a website, both of which are important for marketing the organization. An institutional email and web page also make it possible to be listed on the institution's contact directories, which increases the retirement organization's visibility within the campus and community.

Long-Term Sustainability

As primarily volunteer organizations, retirement associations must develop systems and strategies to ensure their long-term sustainability. Issues that arise as associations mature include member recruitment/retention, board member and volunteer recruitment, record keeping, database management, relevant programming and sustainable events. These issues are beyond the scope of this Start-Up Kit, but AROHE members and the AROHE consulting service can provide assistance to organizations that are facing challenges with long-term sustainability.

Unique Organizations

As mentioned in earlier sections, retirement organizations vary in structure and purpose, depending on the size, culture and needs of the college/university and its retirees. Smaller colleges tend to form more informal groups and larger universities may sponsor multiple organizations or systemwide groups.

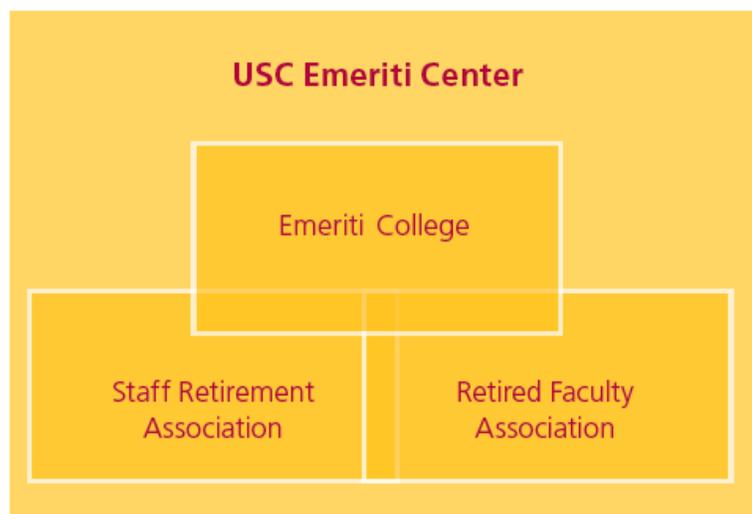
Small Liberal Arts Colleges

Liberal arts colleges generally have smaller, more close-knit communities and therefore tend to operate more informally than larger institutions. Smaller institutions are more likely to include both faculty and staff in their retirement associations. They may operate without by-laws, dues, elections or a formal committee system; instead, a volunteer steering committee may organize events and activities. Funding may come from dedicated endowments, from the college or a combination of both. Programs may be similar to those found in the associations of larger institutions, but on a smaller scale.

Multiple Retirement Organizations

Some colleges and universities have multiple types of retirement organizations. For example, most of the University of California campuses have retirement centers as well as emeriti faculty and retired staff associations. The University of Southern California has a center, retired faculty and staff associations and an emeriti college. In such cases, the organizations work in tandem with one another to serve their retired faculty and staff.

UNIVERSITY OF SOUTHERN CALIFORNIA



Systemwide organizations

Some large statewide universities may have developed systemwide retirement organizations, such as these three examples:

- Council of University of California Emeriti Associations (CUCEA) and Council of University of California Retirees Associations (CUCRA)—these UC-systemwide organizations are consortia comprised of representatives from the emeriti faculty and retirees associations on the individual UC campuses. CUCRA and CUCEA advocate on behalf of retired faculty and staff with the UC Office of the President (OP) and state government and seek to establish mutually-beneficial programs for UC and its retirees. The two organizations meet twice per year with OP administrators and communicate with state legislators and community leaders as needed.
- State University of New York (SUNY) Retirees Service Corp (RSC)—The RSC creates awareness about the potential value of retired faculty, administrators and support staff, and encourages individual SUNY campuses to establish programs to promote "retiree-campus-community" relationships.
- California State University Emeritus & Retired Faculty & Staff Association (CSU-ERFSA)—CSU-ERFSA addresses the concerns and protects the rights of all retired California State University faculty and staff, representing the interests of its membership before the state legislature and federal government, various state and federal agencies, CalPERS and the California State University Chancellor's Office.

Activities and Programs

Retirement organizations sponsor a wide range of intergenerational, multicultural and interdisciplinary programs, activities and services that are of benefit to the university and to their own constituencies. Often, retirement organizations will offer a combination of events that they have planned themselves as well as events that they have co-sponsored with other campus departments or community organizations.

Organizations may also publicize events for campus departments or community organizations, inviting retirees to attend. Events may be open to members only, all retirees and their guests, spouses/partners and other university affiliates. Some of the more common types of activities and programs include:

Activities/Programs to Serve Retirees

Social Events

Retirement organizations typically sponsor a variety of social functions that connect retired faculty and staff with their campus and with each other. While all events include some social component, purely social events such as picnics, potlucks and wine and cheese receptions are usually a popular undertaking. These types of events are often fee-based, but the organization or the college/university may also partially or fully subsidize the cost of these events.

Educational Programs

Many retired faculty and staff maintain a keen interest in lifelong learning, so retirement organizations often find that educational programs draw more attendees than social programs. In most college/universities, speakers are readily available and may include current faculty and staff, retirees,

authors and community leaders. On some campuses, the adult education program, lifelong learning center or longevity program is closely linked to the retirement organization. In these cases, the retirement organization may publicize programs and/or recruit retired faculty/staff to serve as lecturers or board members for these groups.

Most organizations find that offering food is a great draw for events and that including a meal or snack, ranging from light refreshments to a catered breakfast, lunch or dinner is beneficial. Attendees may pay for the meal, or the cost may be covered by the organization or the institution. Some associations have success with offering programs in private rooms at local restaurants that provide a room at no cost if the group's attendees purchase meals.

Recognition Programs

Many retirement organizations, often in collaboration with campus departments, sponsor programs to recognize retirees, including:

- New retirees receptions
- Research grant programs
- Legacy programs (AROHE members can view “Retiree Brief: Legacy Programs” on the Resources page of the AROHE website)
- Retiree art shows

Interest Groups

Many retirement organizations sponsor interest groups, such as investment groups, book clubs, cooking groups, travel clubs, digital photography clubs, technology-use groups, game-playing groups, art/craft/hobby enthusiasts and many others. These groups are driven by member preferences; if a retiree has an interest, he/she can start a group and, with the organization's assistance, reach out to retirees to recruit members for the group.

Tours and Travel

Many organizations host tours of local points of interest, as well as longer excursions and world travel. Some groups collaborate with alumni relations offices or other campus travel groups as well as community travel organizations to offer a variety of travel opportunities to their retirees. Tours and travel can be a significant revenue source for organizations. In particular, many group travel companies offer rebates to organizations who recruit participants for group tours.

Activities and Programs to Serve the Institution and Community

Philanthropy

Retirement organizations can contribute to their colleges/universities by collaborating with their advancement/development departments to encourage a culture of philanthropy among retirees. Examples of such collaborative efforts include monetary or named gifts, endowments or estate planning. Specialized fundraising efforts may include things like donating to capital projects, acquiring art work, purchasing books for the library or donating benches or other specialized items to the campus.

Scholarships

Many retirement organizations (primarily retirement associations) sponsor scholarships for qualified students or make awards for specific student accomplishments. Unique awards may also be given for such things as student mentoring initiatives. Scholarships and awards may be limited to specific groups; such as relatives of retirees from that institution; or first-generation, veteran or international students.

Some organizations sponsor scholarships or awards for current staff who are pursuing their education while working for the institution. Associations may coordinate with other campus departments, such as the student scholarship office or the staff association, to process scholarship/award applications and choose recipients.

Sometimes scholarships or awards are funded by the organization's annual dues, event revenue or other annual fundraising drives. In other cases, organizations establish endowments, often through the college/university's foundation, and conduct annual fundraising drives to add to the endowment total over time. The awarding of the scholarships/awards by the retirement organization can be an annual event involving a reception that visibly demonstrates support for the institutions and its goals.

Support for Campus Administration

Many retirement organizations play an important role in facilitating retiree involvement in campus life. Retirees can bring important institutional knowledge and historical perspective to committees, task forces, advisory groups, faculty and staff governance councils and other groups. Retirees might also act in advisory roles, such as giving feedback to long-term plans, assessing space needs, evaluating student achievement and serving on search committees for senior personnel. Successful retirement organizations often seek opportunities to bring retirees into campus decision-making where appropriate and welcomed by the campus administration.

Volunteerism

Retirement organizations can serve as a link to facilitate retiree volunteerism on campus and in the community. An active and visible volunteer program is one of the best ways to meet the goal of retiree service to the institution. Organizations may recruit retirees to serve as volunteers for such needs as:

- Staffing campus events, including new student orientations, open houses and commencements.
- Acting as docents or guides for tours, gardens, performing arts events and athletic events.
- Assisting with academic support such as tutoring, mentoring or advocating for students.
- Providing services for international students, such as language practice or hosting for holidays.
- Serving as judges for competitions such as research symposia.
- Acting as audiences for practice activities like mock courts, performances and speeches.
- Filling a variety of roles at university or community medical centers.
- Providing temporary staffing for conferences and similar events.
- Reading/scoring student applications.
- Filling community needs such as election monitoring, blood drives and social services.

Teaching/Part-Time Work

In most instances, retired faculty teaching is arranged through that person's former academic department. However, retirement organizations can play a role in publicizing teaching opportunities. For example, retired faculty are particularly well suited to teach freshman seminars or to cover for faculty members who are on temporary leave. Likewise, retired staff may be desirable additions to departments during rush periods such as the beginning of the term or may fill in if there is an unexpected opening.

Colleges/universities sometimes do not allow retirees to return to paid work and many have strict policies governing this issue, so retirement organizations who wish to play a role in this regard should first consult with their campus' human resources department.

Mentoring/Advising

Some retirement organizations sponsor, or play a supporting role in, mentoring or advising programs for students, staff or faculty. Retirees may work with residence hall students, former foster youth, at-risk students and other categories of students in need of support and encouragement.

Mentoring and advising programs tend to be very labor-intensive, making it difficult to sustain a program over the long term without paid staff support. Such programs also involve following strict guidelines and college/university policies; retirement organizations may find more success partnering with campus departments that already offer existing programs rather than starting a program from the ground up.

Institutional History Programs

Some retirement organizations, primarily retirement associations and emeriti colleges, carry out or provide support to the institution's archivist or to endeavors to document and create written histories of departments or the college/university. It is common for retirement organizations to prepare and maintain a collection of memorials, biographies and autobiographies of faculty, administrators and staff. This effort may include video- or audio-recorded interviews.

The UC Davis Emeriti Association has sponsored a Video Records Project since the early 1990s, whereby volunteers conduct interviews of emeriti. The resulting videos (400+ to date) are shown on the local community television station and archived for future reference.

In a very successful partnership project, the University of Cincinnati History Department offers an honors class in which undergraduate students interview emeriti for a class project. The interviews are then videotaped and archived to provide an oral history of the campus.

Many retirement organizations play an active role in milestone celebrations for the university related to date of founding or president/chancellor inaugurations.

Speaker Bureaus

Some organizations sponsor speaker bureaus of retirees who give presentations to campus-affiliated groups such as residence hall students and alumni chapters or community groups such as senior centers, service organizations or retirement communities.

Retirement Planning Workshops

Several retirement organizations work with the institution's human resources department to offer retirement planning workshops. Sometimes retirement organizations take the lead in planning and implementing the workshops (mostly retirement centers) and other times organizations play supporting roles to workshops provided by human resources departments. Retirees often serve on panels to speak about their experiences in retirement as a part of these workshops.

Some retirement organizations, including the Emory Emeritus College, have established successful pre-retiree mentoring programs. At some larger institutions, including USC and several University of California campuses, retirement organizations have played a role in developing formal paid positions, sometimes called retirement navigators or retirement liaisons, to provide confidential one-on-one consultations to faculty and/or staff who are considering retirement. These navigators or liaisons can be retirees who are working part-time or they can be full-time employees.

Resource and Referral Information

Some retirement organizations (primarily retirement centers) provide information to their constituencies about such issues as caregiving, social services, housing and other needed services. Some organizations offer support groups or other services to retirees, sometimes in partnership with other campus departments such as work/life wellness or academic/staff assistance departments.

University-Based Retirement Communities

A growing number of universities are collaborating with developers to build retirement communities on or near the campus. These communities may have formal or informal agreements with the campus. The retirement organization can be the driving force for considering such projects and may play a role in creating the community and recruiting residents.

Communities of this type are useful in recruiting new faculty, providing opportunities for alumni to return to their institutions when they retire and providing nearby residences for the institution's retirees and other affiliates. In some cases, retirement communities provide financial support to retirement organizations, such as providing free space for meetings, hosting retiree events, providing in-kind services such as catering or transportation and offering direct financial support. Such arrangements are a win-win for both the retirement organization and the retirement community.

Development companies that have created campus-affiliated communities include Belmont Village Retirement Services (UCLA, UC Berkeley), Pacific Retirement Services (UC Davis) and Kendal (several east coast campuses).

Keys to Success



It has been demonstrated throughout this Start-Up Kit that there are as many approaches to starting a retirement organization as there are active retirement organizations at colleges/universities. As noted at the beginning of the kit, the development of new organizations generally follows one of two models:

- The “top down” model—in this approach, a senior administrator of the institution initiates the establishment of a retiree organization. This model typically involves allocation of office space and staff support, a start-up budget and an agreed-upon mission. Given the institutional commitment and financial support, this model usually accelerates the establishment of the retiree organization.
- The “bottom up” model—in this approach, a group of interested retired faculty and/or staff decide to create a retirement organization and approach the administration for support. In this case, it is vital that organizers show that the university will benefit from providing funds and support to the retirement organization.

Whichever model is selected, the keys to success are similar. They include first assessing the college/university’s needs, identifying ways a retirement organization can meet those needs, determining the interests of retirees and then moving forward to establish the organization. The steps many successful retirement organizations follow include:

1. Assess the Campus Climate

Every college/university has a different culture, priorities and needs and the most successful retirement organizations align their mission, values and goals with those of their college/university. Lightheartedly, AROHE recommends that when forming a new retirement organization, one of the most important steps is to “tune in to your campus’ radio station, **W.I.I.F.M.**” (What’s In It For Me?).



Colleges/universities are much more likely to provide financial support for a retirement organization if there is “something in it for them,” or some benefit to the institution. Questions to consider:

- Does the institution want to increase fundraising? The retirement organization can collaborate with the advancement/development department to encourage a culture of philanthropy among retirees. It is well known that the more “touch points” the college/university provides to its constituents, the more likely those constituents are to support the institution. Retirement organizations can provide those touch points.
- Does the institution want to increase volunteerism? The organization can collaborate with the alumni association, volunteer center or other entities to increase retiree volunteer rates.
- Does the institution want to encourage faculty retirements? The retirement organization can offer senior faculty a definitive role within the university. This can be important, as many faculty are reluctant to retire because they can’t envision a life away from academia.
- Does the institution want to provide better retirement planning support? The retirement organization can collaborate with the human resources department to develop workshops or other retirement planning resources.

These are just a few of the roles retirement organizations can play. Once the greatest campus needs are identified, the developers of a new organization can propose ideas for assisting to meet those needs.

In addition to assessing the campus’ greatest needs, organizers of new retirement organizations should also assess organizations and programs on the campus and in the community that serve older adults. Give consideration to how the establishment of a new organization will affect these groups. Will your organization be seen as a competitor? Might there be overlaps of monetary support from the same funding source? Are potential retirement organization leaders also leaders in other organizations? Make efforts to establish positive relationships with other organizations serving the same population.

Along with identifying persons, groups and offices who will be interested and supportive of a retirement organization, give consideration to those likely to be questioning, skeptical or even critical of the effort and funding being given to retirees and a retirement organization. Make a plan to address such criticism.

2. Involve Retirees in Campus Life

Even before establishing a retirement organization, simple steps can open doors to obtaining support for retired faculty and staff. Find ways to “wiggle your way in” to benefit the college/university.



Don't just talk about ways retirees can be useful; encourage retirees to start being useful. Find out where volunteers are needed and recruit retirees to fill those needs. Facilitate opportunities for retirees to serve on committees, task forces, programs and similar structures. Once retirees start to be more active in campus activities, college/university leaders begin to recognize them as a valuable campus constituency, just like alumni, parents of students and other friends of the institution.

3. Toot Your Own Horn

In many cases, retired faculty and staff are already volunteering and otherwise contributing to the college/university, but their efforts fly under the radar, so campus leaders do not recognize the depth and breadth of retiree contributions.



Seek out retirees who are making valuable contributions and bring these to the attention of the campus. Actions such as developing awards to recognize outstanding retiree contributions, featuring retiree stories on college/university websites or publications or creating bulletin boards that feature the recent work or long-term contributions of a retiree in a department, library or commons can be helpful in bringing retiree contributions to the forefront.

4. Assess Retiree Interests/Needs

The most successful retirement organizations meet the needs of retirees as well as the institution. Early in the establishment process, assess the needs and interests of the institution's retired faculty and staff. This can be accomplished by conducting surveys, convening focus groups and other similar methods.



By specifically learning of retiree desires, organizers do not have to guess as to their level and areas of interest. The results of such analysis will also provide the framework to set goals for the fledgling organization. Lastly, this can be a good method for identifying retiree champions who are passionate and willing to invest the time needed to form an organization. AROHE members can view sample survey questionnaires and survey reports on the Resources page of the AROHE website.

5. Demonstrate Retiree R.O.I.

As mentioned previously, a college/university will be much more likely to provide funding, space and other support for a retirement organization if there is benefit to the institution. When establishing a new organization or advocating for increased support of an existing organization, find ways to demonstrate the institution's Return on Investment (ROI) for supporting retiree programs.



Two ideas that successful retirement organizations have used are:

- Survey retirees with regard to their activities and accomplishments and write a report highlighting their contributions to their institution and/or communities. For example, the University of California retirees and emeriti associations conduct surveys of their constituencies every three years.

The resulting reports repeatedly show a very high level of engagement among the survey respondents. These reports are shared widely with the campus and local communities and are successfully used to advocate for retiree interests. AROHE members can view the most recent UC survey reports on the AROHE website in the "Surveys and Reports" section of the Resources web page.

- Contact the development/advancement department to ask for total contributions by retired faculty and staff. This is often a very impressive number that goes a long way toward commanding campus administrators' attention.

Campuses are much more likely to track emeriti contributions than retired staff contributions. For those institutions that do not track retired faculty and/or staff contributions, a case can be made for the retirement organization playing a role in future tracking to the benefit of the college/university.

7. Find Your Champions

Identify influential retirees who will champion the retirement organization idea and involve them in the exploration phase. Every new idea needs advocates. Retired senior administrators, deans or department chairs, particularly if they are well-known and respected by the current campus leaders, can be powerful proponents and influencers in the development of a new retirement organization.



Depending on the needs of the association, it can be helpful to recruit retirees from specific departments to the organizing team. For example, one organization that was seeking permanent space on campus recruited the retired department chair for the space planning department to participate on their space committee. Led by this retired director, the committee was able to successfully negotiate for a suite of offices in the institution's alumni center.

8. Make Friends in High Places

Seek support of top administrative leaders and influencers early in the process of starting an organization. Be aware of the campus political culture and involve these leaders and influencers with the initial exploration and later development of the retirement organization.



Many developers of new organizations have found success with developing a task force, committee or advisory group, consisting of retirees as well as current high-level faculty and/or staff, to identify options and develop a plan for a new retirement organization.

9. Start Small, Think Big

Most new organizations experience greater success by starting modestly with grassroots efforts and being focused, flexible and inclusive. Set limited and clearly-focused goals and grow over time. Be flexible in the programs and activities offered and listen carefully to the interests expressed by the retirees. Be inclusive of all retired (or retiring) personnel who are interested in participating – faculty, staff and administration.



After experiencing some success and demonstrating retiree R.O.I. to the college/university, organizations can then secure increasing support from their institutions over time. Several new organizations have experienced success by proposing pilot programs, whereby the college/university provides funding for start-up costs and part-time staffing for a specified period of time, typically three years. During the pilot time period, the organization works very hard to show the institution that the investment will pay off, and often finds that funding is continued or even increased after the initial pilot program.

10. Put it in Writing

For those who are establishing a retirement center or emeriti center, or for those seeking financial support or an allocation of space from the college/university for a retirement association, a formal written proposal is a necessity.



The proposal should include information on campus needs and how the retirement organization can meet those needs, contributions retirees make to the institution, a projected budget, proposed funding sources and space needs. Including a comparison of retirement organization support at other colleges/universities can be very persuasive. Some groups start by asking for funding for specific activities, such as subsidies for events, a few hours per week of administrative support, website hosting/assistance or similar small supports. Other groups request an annual budget and extensive staff support. AROHE members can view examples of written proposals on the AROHE website in the “Surveys and Reports” section of the Resources web page.

Once the organization is established, it is important to continue to identify and document indicators of progress and success, particularly if the success of a pilot program will be the basis for continued institutional support. Such information can be in the form of goal statements, event attendance reports, program and activity evaluations or financial and budgetary statements related to expenditures and contributions. Such information can ultimately be summarized into an annual report and/or departmental report to substantiate the worth of the retiree organization. AROHE members can view example annual reports on the AROHE website in the “Surveys and Reports” section of the Resources web page.

11. Use AROHE Resources

AROHE members include a mix of retirement organization leaders and volunteers, paid staff and college/university administrators who understand the operations of retirement organizations. AROHE members are encouraged to take advantage of opportunities for networking and information sharing with more experienced members who willingly “give back” to assist organizations in their formative stages.



From sample documents to consulting services, the resources offered by AROHE can save significant time and energy for those establishing and building organizations. Those who have not already joined AROHE are encouraged to do so. AROHE members are encouraged to take full advantage of member networking and resources.

AROHE Consulting Services

AROHE consultants offer a mix of innovation and solid practicality with the ultimate goal of transforming academic retirement for the benefit of both the institution and the retiree. Retirees or campus administrators who are working to establish a new organization or revitalize an existing one can save time by using AROHE experts to assist with:

- Creating win-win relationships with your retired faculty and staff.
- Advising you about advocating for benefits and privileges for your retired faculty and staff.
- Establishing a new retirement organization or enhancing the appeal and effectiveness of an existing retirement organization.
- Suggesting ways of seeking financial support for retiree programs or retirement organizations.
- Making the retirement process easier and more appealing to faculty and staff.

What does consulting include?

A consultation begins with a conversation to identify the organization’s needs and desired outcomes. Whether you are just exploring the possibility of establishing a retirement organization or you are hoping to expand an existing organization, consultants can assist with an array of services, including:

- Showing specific benefits a retirement organization can bring to the college/university
- Finding effective ways to engage retired faculty and staff into campus life
- Highlighting the many contributions retirees make to their institution
- Assessing retiree needs/interests via surveys and/or focus groups
- Showing the return on investment for campus support of retiree organization
- Identifying stakeholders and champions
- Growing at a realistic and sustainable pace
- Writing a formal proposal for funding or other support

Consulting packages

AROHE offers several basic consulting packages which can be tailored to meet an organization’s specific needs. As a special introductory offer to new members, consulting packages include a one-year AROHE membership. Visit the AROHE website at <http://arohe.org> for details.

	Level 1 \$400	Level 2 \$1,800 + travel	Level 3 \$2,400 + travel	Level 4 \$3,000 + travel
Up to six hours of phone and/or e-consultation	✓	✓	✓	✓
One-day site visit		✓	✓	✓
Presentation to campus leaders			✓	✓
Written report of recommendations				✓