Innovations for the Next Decade:

A TRIANGLE OF ADVENTURES IN NORTH CAROLINA

AROHE 10th ANNIVERSARY CONFERENCE
OCTOBER 21-24, 2012
The Carolina Inn

University of North Carolina
CHAPEL HILL, NORTH CAROLINA

www.arohe.org
AROHE’s Mission

AROHE, the first national and international association of retiree organizations, is committed to advocating for, educating, and serving retired faculty and staff in higher education. AROHE brings together the talent, knowledge and experience of retired faculty and staff to improve the quality of their lives and that of their communities and institutions through creating new models of retirement.

A Chronology of the Association of Retirement Organizations in Higher Education (AROHE)

The History of AROHE began in 1984 with a survey of public and private universities conducted by the USC Emeriti Center at the University of Southern California (USC). Only 25 of more than 100 respondents indicated that their campuses had any formal group or center supporting retired faculty and staff. In May 1985, ten institutions attended the first Conference on Retirement at USC, and the newly named “West Coast Conference on Retirement in Colleges and Universities” continued annually through 1988. The University of Washington hosted a conference for twenty-two US and Canadian institutions in 1989, but efforts to expand did not gather momentum until 1998 when several inspired retiree leaders met for a strategic planning cruise conference where pivotal ideas led to the future creation of AROHE.

At the conference at North Carolina State University in 2000 the attendees launched a multi-campus association dedicated to providing a forum for discussing all aspects of retirement in higher education. Paul Hadley from USC was its organizing president. In 2002, the inaugural conference at Indiana University officially named the Association of Retirement Organizations in Higher Education and AROHE was formally incorporated as a 501(c) (3) nonprofit organization. In addition to publishing a newsletter and providing on-line resources, AROHE continued hosting biennial conferences and other meetings. AROHE’s biennial conference sites have included: Vanderbilt University, Nashville, TN (2004), Arizona State University, Tempe, AZ (2006), USC, Los Angeles, CA (2008) and Wesleyan University, Middleton, CT (2010). Today AROHE’s membership has grown to over seventy universities.

AROHE provides membership value through the AROHE.org website allowing members to search for member contacts, manage membership payments, view best practices, and locate key AROHE resources. Major resources include the Start-up Kit to assist institutions in forming retirement organizations and critical data from the 2008 and 2010 AROHE Survey of College and University Retiree Organizations.
AROHE 10th Anniversary Conference  
Innovations for the Next Decade: A Triangle of Adventures in North Carolina  
October 21-24, 2012  
See the Program Contributors booklet for presenter biographies and photos.

**SUNDAY, OCTOBER 21**

**Pre-Conference Activities**

**12:00 NOON - 5:30 PM**
Registration, Chancellors West Lobby

**1:30 PM - 3:30 PM**
Pre-Conference Workshop:  
*Starting a Retirement Organization*  
Leader: Janette Brown, AROHE and the University of Southern California.

Sunday **Special Events and Tours** flyer available at Registration in Chancellors Lobby West

**5:30 PM - 7:30 PM**
Presidents’ Welcome Reception  
Sponsor: Bobbie Boyd Lubker, AROHE President
University of North Carolina System President’s Residence  
400 E. Franklin Street - Trolley and van departure time information will be in Carolina Inn lobby

**MONDAY, OCTOBER 22**

**7:30 AM - 10:00 AM**
Registration, Chancellors West Lobby

**7:30 AM - 8:30 AM**
Continental Breakfast  
Old Well Room

Optional Activity: Morning Networking Tables

**Directors and Institutional Representatives Table**  
Hosts: Sue Barnes, University of California, Davis; Ann Kohner, Winona State University; Jerry Walker, University of Southern California

**Faculty Networking Table**  
Hosts: Susan Kress, Skidmore College; Nancy O’Hare, James Madison University

**International Associations and Activities Networking Table**  
Hosts: Leonard Gordon, Arizona State University; Ken Rea, University of Toronto

**Small and Newly Formed Associations**  
Host: Pierce Mullen, Montana State University, *Mountains and Minds: Montana State University’s Motto and Its Retirees*

**Staff Networking Table**  
Hosts: Larry Sawyer, Portland State University; Norma Summersgill, San Diego State University

**8:30 AM - 9:00 AM**
Conference Opening and Welcome  
*Chancellor’s Ballroom*
Bobbie Boyd Lubker, AROHE President  
Janette Brown, AROHE Executive Director  
Frank Abrams, Tri-Campus Coalition

**9:00 AM - 10:00 AM**
Principal Plenary, *Paul Hadley Honorary Address*  
*Chancellor’s Ballroom*
Convener: Arthrell Sanders, North Carolina Central University  
Sponsor: University of North Carolina at Chapel Hill

Keynote: *Outer Space, Inner Space, Creative Space: Riffing on Retirement.*  
Speaker: Trudier Harris, Professor of English, University of Alabama and the J. Carlyle Sitterson Professor of English Emerita, UNC Chapel at Hill

**10:00 AM - 10:15 AM • BREAK**  
Sponsor: Carolina Meadows Retirement Community

**10:15 AM - 11:15 AM • CONCURRENT SESSIONS**

**Concurrent #1, Chancellor West**  
Convener: Janette Brown, AROHE and the University of Southern California
**Presentation: ACE/Sloan Supporting the Culminating Stages of Faculty Careers Project**  
Presenters: Lauren Duranleau and Claire Van Ummersen, Institutional Leadership Group, Division of Leadership and Lifelong Learning, American Council on Education

**Concurrent #2, Chancellor East**  
Convener: Dave Ewert, Georgia State University
**Workshop: Preserving Your Memories: A Primer on Recording Your Life Story Through Oral History and Artifact Preservation (Session repeats Wednesday).**  
Presenters: Gail Deaton and Jenny Kulikowski, Interwoven Heritage Services

**11:15 AM - 12:00 NOON • CONCURRENT SESSIONS**

**Concurrent #1, Chancellor West**  
Convener: Susanne Thomas, Emory University
**AROHE RESOURCES**  
**AROHE Survey Update**  
Presenter: Janette Brown, AROHE and University of Southern California

**Concurrent #2, Chancellor East**  
Convener: Leonard Gordon, Arizona State University
**Presentation: Socially Responsible Investing.**  
Presenter: Tony Sigmon, Collegiate Capital Management

**12:00 NOON - 1:30 PM**
AROHE Biennial Luncheon  
Old Well Room  
Host: Bobbie Boyd Lubker, AROHE President  
Sponsor: Belmont Village Senior Living

AROHE Business Meeting

**1:30 PM - 2:35 PM**
Plenary, *Living Life*  
*Chancellor’s Ballroom*
Convener: Jerome Walker, University of Southern California  
Sponsor: Collegiate Capital Management, Inc.

**Keynote: Retirement Planning and the Future of Pension Plans in the U.S.**  
Speaker: Robert Clark, Professor of Economics and Management, Innovation, Entrepreneurship, North Carolina State University

**2:35 PM - 2:55 PM • BREAK**
2:55 PM - 4:00 PM • CONCURRENT SESSIONS

**Concurrent #1, Chancellor East**
Convener: Jonathan Howes, University of North Carolina at Chapel Hill

**Presentation: Fraud, Vulnerability and Aging: How Criminals Repeatedly Exploit Age-Related Vulnerabilities**
Presenter: David Kirkman, North Carolina Department of Justice

**Concurrent #2, Chancellor West**
Convener: John Bugge, Emory University
Panel: Educational Efforts of Retiree Organizations

**Planning for Retirement: How Penn Prepares Senior Faculty**
Presenter: Anna Meadows, University of Pennsylvania

**Reaching Out From the Center: Educational Efforts Emanating From The Wasch Center**
Presenters: Karl Scheibe and William Wasch, Wesleyan University

**The Retired Faculty Research Seminar at Boston College**
Presenter: Dennis Taylor, Boston College

**4:00 PM - 4:30 PM**
*Free Time. Please be seated on a coach in the coach loading area for departure at 4:30 PM.*

**4:30 PM**
*Coaches depart for trip to North Carolina Central University, Durham, North Carolina.*

**6:00 PM**
*Dinner and campus tour, North Carolina Central University*  
Sponsor: North Carolina Central University

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**TUESDAY, OCTOBER 23**

**7:30 AM - 10:00 AM**
Registration, Chancellors West Lobby

**7:30 AM - 9:00 AM**
Continental Breakfast
*Old Well Room*

Optional Activity: Morning Networking Tables

**Education and Creative Projects Networking Table**
Hosts: Anna Meadows, University of Pennsylvania; Karl Scheibe, Wesleyan University; Dennis Taylor, Boston College

**Local Consortia Networking Table**
Hosts: John Bugge, Emory University; Dave Ewert, Georgia State University

**Multi-Campus Emeriti and Retiree Associations Networking Tables**
Host: Eddie Murphy, University of California, Los Angeles

**Technology Programs and Projects Networking Table**
Hosts: Linda Pearson, Ivy Tech Community College of Indiana; Robert Scales, University of Southern California

**Volunteers and Service Networking Table**
Host: Sue Barnes, University of California, Davis

**9:00 AM - 10:00 AM**
**Plenary, Health and Wellness**

**Chancellor’s Ballroom**
Convener: Sue Barnes, University of California, Davis

**Keynote: Rethinking Aging: Growing Old and Living Well in an Over Treated Society**
Speaker: Nortin Hadler, Professor of Medicine, Microbiology and Immunology, University of North Carolina at Chapel Hill

**10:00 AM - 10:15 AM • BREAK**

**10:15 AM - 11:15 AM • CONCURRENT SESSIONS**

**Concurrent #1, Chancellor West**
Convener: John Meyer, University of Windsor and College and University Retiree Associations of Canada (CURAC).

**Presentation: Bridging the Gap: A New Generation of Retirees**
Presenters: Rod Rose, John Dahl and Eddie Murphy, University of California, Los Angeles

**Concurrent #2, Chancellor East**
Convener: William Wasch, Wesleyan University
Panel: Retirement Housing:

**Campus Proximal Senior Housing.**
Presenter: Margaret Scott, Belmont Village Senior Living

**Engaging Community Partners to Improve Care Transitions, Reduce Re-Hospitalizations and Decrease Health Care Costs for Retirees.**
Presenter: Jessica Fines, Carol Woods Retirement Community

**11:15 AM – 12:00 NOON • CONCURRENT SESSIONS**

**Concurrent #1, Chancellor West**
Convener: Linda Pearson, Ivy Tech Community College of Indiana

**Presentation: Workplace Wellness and Retirement Pathways for Staff and Faculty Working in Academic Institutions.**
Presenter: Brian Kaskie, University of Iowa

**Concurrent #2, Chancellor East**
Convener: Fanchon Funk, Florida State University
Panel: Establishing Local Consortia of AROHE.
Panelists: John Bugge, Emory University; Dave Ewert, Georgia State University; Lucy Rollin, Clemson University

**Concurrent #3, Hill Ballroom South**
Round Table: Personal Aspects of Retirement: Change and Adaptation

**Meditations With Max.**
Leader: Eugene Bianchi, Emory University.
My New Career: Editor of an Emeritus College Newsletter and Writer
Leader: Winifred Doane, Arizona State University.

12:00 NOON - 1:30 PM
Carolina Luncheon, Old Well Room
Host: Donald Boulton, University of North Carolina at Chapel Hill
Sponsor: Carol Woods Retirement Community

1:30 PM - 2:35 PM
Plenary, Connectedness
Chancellor’s Ballroom
Convener: Jeri Frederick, University of California, Irvine
Keynote: Retirement in Academia: Rethinking Politics, Priorities and Procedures
Speaker: David Perlmutter, Professor, Starch Faculty Fellow, and Director of the School of Journalism and Mass Communication at the University of Iowa

2:35 PM - 2:55 PM • BREAK

2:55 PM - 4:00 PM • CONCURRENT SESSIONS
Concurrent #1, Chancellor West
Convener: Ram Chugh, State University of New York
Panel: Retiree Organizations Connecting!

Passion and Purpose: Transformative Connections
Presenter: Patrick Cullinane, University of California, Berkeley

Retirement Transitions Programming as an Organization Mission
Presenter: Pat Dougherty, University of Washington

Successful Fundraising Campaigns
Presenter: Diane Smathers, Clemson University

Concurrent #2, Chancellor East
Convener: Donald Boulton, University of North Carolina at Chapel Hill

Presentation: Social Security, the Jewel in the Crown of American Social Welfare
Presenter: Andrew Dobelstein, University of North Carolina at Chapel Hill

4:00 PM - 4:30 PM
Free Time. Please be seated on a coach in the coach loading area for departure at 4:30 PM.

4:30 PM
Coaches depart for trip to North Carolina State University and North Carolina Museum of Art.

6:00 PM
AROHE 10th Anniversary Reception, tour North Carolina State University; and banquet at North Carolina Museum of Art
Sponsor: North Carolina State University

WEDNESDAY, OCTOBER 24

7:30 AM - 9:00 AM
Continental Breakfast
Old Well Room
Optional Activity: Morning Networking Tables

Personal Aspects of Retirement Networking Table
Host: Eugene Bianchi, Emory University

Public Relations, Marketing and Newsletters Networking Table
Hosts: Jeri I. Frederick, University of California, Irvine; Fanchon Funk, Florida State University

Retirement Organizations Connecting Networking Table
Host: Patrick Cullinane, University of California, Berkeley

9:00 AM - 10:00 AM • CONCURRENT SESSIONS
Concurrent #1, Chancellor West
Convener: Lucy Rollin, Clemson University

Presentation: What Makes for a Successful Emeritus College: Triangulation and the Experience of the Arizona State University Emeritus College
Presenter: Leonard Gordon, Arizona State University

Concurrent #2, Chancellor East
Convener: David Longbrake, University of Denver.

Presentation: International Perspectives on Retirement Organizations
Presenters: John Meyer, University of Windsor and CURAC; Ken Rea, University of Toronto

10:00 AM - 10:15 AM • BREAK

10:15 AM - 11:15 AM • CONCURRENT SESSIONS
Concurrent #1, Chancellor West
Convener: Patrick Cullinane, University of California, Berkeley

Workshop: Jumpstart Your Volunteer Program
Presenter: Sue Barnes, University of California, Davis

Concurrent #2, Chancellor East
Convener: Helene Lang, University of Vermont

Workshop: Preserving Your Memories: A Primer on Recording Your Life Story Through Oral History and Artifact Preservation (Session repeated from Monday)
Presenters: Gail Deallon and Jenny Kulikowski, Interwoven Heritage Services

11:15 AM – 12:00 NOON
Concluding Session, Chancellor West
Convener: Bobbie Boyd Lubker, AROHE President

Panel and Open Forum: Innovations for the Next Decade

CONFERENCE CONCLUDES

OPTIONAL SIDE TRIPS
Contact: Jean Holcomb, Viking Travel, 919-968-4586, jeanholcomb@vikingtravel.com; Monday–Friday, 2:00 PM-5:00 PM
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(adapted from the University’s mission statement)
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Proudly saluting AROHE’s 10th Anniversary Conference: Innovations for the Next Decade.

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Belmont Village Westwood, developed in collaboration with the UCLA Emeriti & Retiree Joint Housing Committee