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The Association of Retirement Organizations in Higher Education
Ninth Biennial AROHE Conference

October 7-9, 2018
Atlanta, Georgia

RE-CREATING RETIREMENT: Connect, Serve, Celebrate!

Hosted by

Emeritus College

Co-hosted by GA-HERO: Georgia Association of Higher Education Retiree Organizations

AROHE2018.org
CONFERENCE SCHEDULE AT A GLANCE

TUESDAY, OCTOBER 9
11:00–4:00  Signature Event: “Only in Atlanta”
2:00–6:00  Conference Registration Opens
2:00–4:00  Meet Your Hosts: Emory Emeritus College and GA-HERO
5:00–7:00  Reception: Stuart A. Rose Manuscript, Archives, & Rare Book Library; Banquet: Cox Hall

MONDAY, OCTOBER 8
7:30—  Conference Registration Continues
7:30–8:30  Continental Breakfast
8:30–9:00  Welcome and Introductions
9:00–10:00  Keynote Address: Steven Tipton
   The Life to Come: Dreams and Doubts of Retirement
10:30–11:45  Round 1: Concurrent Sessions
   Noon–1:00  Lunch
1:15–2:15  AROHE Plenary Panel
2:30–3:00  Sponsor Speakers
3:15–4:30  Round 2: Concurrent Sessions
4:30–6:15  RESOURCE EXCHANGE FAIR
6:30  Atlanta Dine-Around

TUESDAY, OCTOBER 9
7:30—  Conference Registration Continues
7:30–8:30  Continental Breakfast
8:30–9:00  Welcome and Introductions
9:00–10:00  Keynote Address: Roger Baldwin
   Reinventing Academic Retirement: Where Are We Now?
10:30–11:45  Round 3: Concurrent Sessions
   Noon–1:00  Lunch
1:15–3:00  AROHE Plenary Panel and Wrap-up
3:30–4:00  AROHE Business Meeting

Linda Pearson (lp1874@joink.com), who serves on AROHE’s Effective Practices Committee, previously served on the AROHE Board. As a staff member in the Office of Academic Affairs and Dean of the Faculties at Indiana University, she helped establish the Emeriti House. She is now adjunct faculty at Ivy Tech Community College. (AROHE Plenary 2)

James T. Reynolds (preynolds@wvu.edu) is Professor Emeritus of Sociology, Winona State University, where he served for 35 years as a faculty member, department chairperson, Interim Dean of the College of Liberal Arts, and, latterly, as Co-Founder and active member of the WSU Retiree Center. (Session 2)

Anne C. Richards (arichard@westga.edu) was a member of the initial Steering Committee that brought the Association of Retired Faculty and Staff at the University of West Georgia into being. She is a Professor Emerita of Psychology (UWG) and a registered neutral mediator. (REF, Legacy Projects)

M. Elaine Richardson (erchrd@clermson.edu) is a Professor Emerita of the Animal and Veterinary Science Department at Clemson. In 2002, she became Director of the Academic Success Center and did that until her retirement in 2014. She remains active in Emeritus College programs and in the National College Learning Center Association. (Session 7)

Diana Smith (dilsmith@umbc.edu) is a Program Management Specialist at the University of Maryland, Baltimore County and serves as administrative support for The Wisdom Institute. She is looking forward to the time when she can enjoy the benefits of The Wisdom Institute. In the meantime, she enjoys serving as liaison between the university and its retirees. (Session 3)

Gail Steinberg (gail.steinberg@me.com) is an Encore Fellow working with AROHE to improve marketing and fundraising approaches; she has 35 years of experience in management, strategic planning, and analysis, including work in higher education. (REF, ENCORE; AROHE Plenary 2)

Amy Strage (amy.strage@sjsu.edu) is Assistant VP for Faculty Development at San José State University, where she develops and oversees programs to support faculty across the range of their professional responsibilities and throughout the arc of their careers. Her recent research has focused on the needs of mid-career and senior career faculty. (Session 9; REF, Legacy Projects)

David Stumpf (david@stumpf.org), Treasurer of AROHE, is President of the Northwestern Emeritus Organization (NEO) and founding Chief Editor of the NEO Newsletter. He chaired the Department of Neurology at Northwestern University and its clinical arm, now called Northwestern Medicine. He currently mentors at MATTER, a Chicago health startup ecosystem. (AROHE Plenary 1 & 2)

Cary Sweeney (cary.sweeney@berkeley.edu) holds a Master’s of Gerontology from Virginia Commonwealth University where she focused on adult education. She has 19+ years of experience in coordinating and managing programs in geriatrics and gerontology aimed at improving the well-being of older adults. She currently leads the UC-Berkeley Retirement Center as its Director. (Session 1, Session 6)

Stephen Tredwell (tredwell@me.com) is Professor Emeritus of Orthopaedic Medicine with the University of British Columbia, retired as Deputy Director, Department of Orthopaedic Surgery, and a member of the Paediatric Orthopaedic Society of North America and the International Paediatric Orthopaedic Think Tank. He is a co-founder of the new UBC Emeritus College. (Session 4)

Mícheál Vaughan (micheal@u.washington.edu) is President of the University of Washington Retiree Association (2018-19) and Professor Emeritus, Comparative Literature, Cinema and Media. (REF, with Session 6)

William (Bill) Verdini (Bill.Verdini@asu.edu) is Professor Emeritus of Supply Chain Management in the Wrigley Global Institute of Sustainability at Arizona State University and a current Member of the AROHE Board of Directors. (Session 4)

Margi Wadden (mwadden@uw.edu), First Vice President of the University of Washington Retiree Association (2018-19), retired from administrative management as Administrative Operations Director, Office of Vice President for Medical Affairs, UW Medicine. (REF, with Session 6)

Barbara Hanna Wasik (wasik@unc.edu), William R. Kenan, Jr. Distinguished Professor Emerita at the University of North Carolina at Chapel Hill and a fellow of the UNC FPG Child Development Institute, is a clinical child psychologist who researches social, emotional, and academic concerns of children. She is currently addressing issues with faculty retirement. (Session 1)

Vctor Marshand Webb (victorw2@aol.com) is retired as an Adjunct Professor in the Annenberg School for Communication and Journalism at the University of Southern California and also retired from many decades at CBS Television in Los Angeles. He serves in the USC Retired Faculty Association and in the USC Emeriti Center. (Session 3)

Judith Wilk (judith.wilt@bc.edu) has been Chair of English and is now Secretary of the Boston College Association of Retired Faculty. She still writes and teaches (one course a year) in her fields of Victorian fiction, gender studies, and popular culture. (Session 8)

Dorothy Zinsmeister (dzinsmei@kennesaw.edu), Professor Emerita of Biology at Kennesaw State University, has served as Co-Chair of the KSU Retiree Association and as Chair of the University System of Georgia Retiree Council. She still serves on the Board of the Georgia Association of Higher Education Organizations (GA-HERO). (Session 9)
tion to the Advisory Board, staff, and programming of the Retiree Center, and currently serves on the AROHE Board of Directors. (Session 2; REF, Legacy Projects)

Michael Klineman (mkline50@iastate.edu) is retired as an administrator from the Marshall School of Business at the University of Southern California and as a faculty member from the Counseling Department at Santa Monica College. He is currently in his second term as President of the USC Retired Staff Association. (Session 3)

Susan Kress (skress@skidmore.edu) is retired from her position as Vice President for Academic Affairs and Professor of English at Skidmore College, where she served for 38 years. She sat on AROHE’s Board for two terms, still participates on AROHE committees, and is an active member of Skidmore’s Retiree Planning Group. (Session 2; REF, Legacy Projects)

Laura Kretschmer (laura.kretschmer@uc.edu) is Professor Emerita of Audiology who served for 43 years at the University of Cincinnati having taught all the master’s graduates in speech-language pathology and audiology during those years. She is the current Secretary of the Emeriti Board and Chair of the Health & Wellness Committee. (Session 2)

Diane Lee (dle@umbc.edu) is Emerita Vice Provost and Dean of Undergraduate Academic Affairs with over 30 years at the University of Maryland, Baltimore County as Curator of the Wicomico Institute, UMBC’s Association for Retirees, and trying to remember she’s retired. (Session 3, #28)

Marilyn Hazzard Lineberger (mlinebe@emory.edu) is Director of FSAP Services and Licensed Psychologist for the Faculty Staff Assistance Program (FSAP) of Emory University and Emory Healthcare where she provides leadership, consultative, and varied direct services. She has worked extensively with the Emory University Emeritus College Faculty Mentoring Program. (Session 1)

Burton Marcus (bmarcus@usc.edu) is an Associate Professor of Business Emeritus at the University of Southern California, Board member, USC Faculty Retiree Association, and Board member, USC Emeriti Center. (REF, with Session 1)

Eugene B. “Bill” McGregor (mcmgregor@indiana.edu) is Professor Emeritus in the School of Public and Environmental Affairs at Indiana University. He established SPEA’s Overseas Education Programs and now travels to support them. His research falls at the intersection of governance, public policy, and management operations with applications in education and economic development. (Session 7)

Joan Merdinger (nmerdinger@gmail.com) is Emerita Professor of Social Work at San José State University and Past President of the SJSU-Emeritus and Retired Faculty Association. Her current research interests include faculty career flexibility and faculty transitions to retirement. She is a member of the AROHE Board. (Session 9)

Patricia Miezinski (patricia.miezinski@uc.edu), a Professor of Nursing, served 25 years as a faculty member at the University of Cincinnati. Upon retirement, she became a member of the UC Emeriti Association Board. For 18 months, she was the Interim Director of the newly formed Emeriti Center at the University of Cincinnati. (Session 2)

Jean Mooney (mooney@bc.edu) was a member of the Department of Teacher Education and Special Education at Boston College. She has served many roles in the Association of Retired Faculty at BC and volunteers in a K-8 parochial school in Boston supporting students who struggle. (Session 8)

Barbara B. Moran (moran@ils.unc.edu) recently retired as Wilson Distinguished Professor at the School of Information and Library Science, University of North Carolina at Chapel Hill, after 36 years as a faculty member and Dean. Her research focuses primarily on management issues including leadership, organizational development, and career progression, including progression from the workforce to retirement. (Session 1)

Colleen O’Connor-Rickey (oconnor@mtholyoke.edu) is an Academic Administrative Coordinator in the Office of the Dean of Faculty at Mount Holyoke College. She has worked on the emeriti initiative at Holyoke in varying roles for three years. (Session 2)

Jean O’Neil (jean.oneil@bc.edu) is a Connell School of Nursing Associate Professor Emerita who served as Director of the Boston College Association of Retired Faculty President from 2011 to 2014 and as Newsletter Editor from 2014 to 2018. (Session 8)

David Nussbaum (dnussbaum@belmontvillage.com) is Executive Vice President, New Markets and Venues, Belmont Village. He led Belmont Village’s entry into California’s Silicon Valley as project manager for both San Jose and Sunnyvale and is now leading the project in Fort Lauderdale where the largest Belmont Village ever will open next year. (Sponsor Plenary; REF)

Helen S. O’Shea (hoshea@emory.edu) is Professor of Nursing Emerita at Emory University where she served as teaching faculty, Director of the BSN Program, and Chair of the Adult & Elder Health Department. She is an active member of the Emory Emeritus College and is Chair of the Pre-retirement Mentoring Committee. (Session 1)

Aurea K. Osgood (aosgood@winona.edu), a Professor of Sociology at Winona State University, teaches courses on the sociology of families, poverty, demography, and research methods. Her research focuses on food insecurity and pedagogy. She has worked with the WSU Retiree Center primarily in the areas of assessment and program evaluation. (REF, with Session 9)

Michael Pearn (michael.pearn@resiliencinglab.com), Co-Founder of Resilient Aging Lab LLC, is an organizational psychologist whose work in the last twenty years has focused on building resilience and well-being in individuals, teams, and whole organizations. He is a Consulting Expert to the UC-Berkeley Interdisciplinary Center for Healthy Workplaces. (Session 1)

Co-Founders of Resilient Aging Lab LLC, is an organizational psychologist whose work in the last twenty years has focused on building resilience and well-being in individuals, teams, and whole organizations. He is a Consulting Expert to the UC-Berkeley Interdisciplinary Center for Healthy Workplaces. (Session 1)

The rich array of offerings in this year’s conference program showcase the many ways that AROHE supports campus-based retiree organizations that in turn support the intellectual, social, and physical well-being of retired faculty and staff as they pursue a re-created version of retirement, one in which they continue to make valuable contributions to the academic community and to society at large.

In your time here among us, you will have ample opportunity to connect with other un-retiring retirees whose organizations help them thus serve their home institutions and the wider world, as well—all while enriching their own lives enormously—cause for celebration.

We are very grateful to our hosts, Emory University and its Emeritus College along with its partners from GA-HERO, the Georgia Association of Higher Education Retiree Organizations, and we are grateful, too, to the representatives of AROHE who have worked with the Georgians in the Planning Group to ensure that this will be our finest conference to date. Enjoy.

We of Emory University and other members of the Georgia Association of Higher Education Retiree Organizations (GA-HERO) are proud to sponsor the Ninth Biennial AROHE Conference.

You are here because you are a driver of change, a vital participant in a North American movement toward rethinking the role of retirement in higher education. And because you’ve committed yourself to a campaign of consciousness-raising and social change in what AROHE sees as a new culture of retirement. And because, as a person with broad leadership experience in academic settings, you know the kind of retirement we are re-creating for ourselves can—and perhaps will, in time—serve as a model for society at large.

We hereby offer you an opportunity to share with like-minded colleagues your thoughts about retirement as a life-stage of renewed purpose and passion. Don’t waste a minute. Join in, generously, as we consider the many ways the organizations we represent provide a gateway to a future of productive endeavor, intellectual engagement, and collegial relationships.
South America and the Caribbean. He is a member of the Emeriti House Advisory Board and co-chairs the Program Committee. (Session 7)

Gray Crouse (gcrouse@emory.edu), at Emory since 1984, has been the Director of the Emeritus College since 2014. In addition to teaching and doing research in geology, he has served on numerous faculty committees, including time as President of the University Senate and Chair of the University Faculty Council. He is on the AROHE Board. (Session 5)

Ruth Curran (rcurran@globalvolunteers.org) is Director of Partnerships and Collaborations for Global Volunteers, a non-profit development organization engaging short-term volunteers on long-term community service projects. She has researched, written, and spoken about the health and longevity benefits of living with purpose, life-long learning, and meaningful engagement in life. (Session 9)

Stuart Donovan (SDonovan@tiaa.org) is Director of Individual Advisor Services, TIAA Financial Services, in the Greater Atlanta Area. He spoke to attendees at a recent meeting of the Georgia Association of Higher Education Retirees Organizations (GA-HERO) about wealth management before and during retirement. (Sponsor Plenary)

Karlin Elliott (karin.elliott@usg.edu) is the Interim Vice Chancellor of Human Resources at the University System of Georgia. She is responsible for directing the development and administration of the strategies, plans, policies, and programs targeted at maximizing employee effectiveness in contributing to the Board of Regents’ objectives. (Session 9)

David (Dave) Ewert (dewert@gsu.edu) is Professor Emeritus of Finance and Director Emeritus of the Executive MBA Program at Georgia State University. He has served on AROHE’s Board and as President of the Georgia Association of Higher Education Retirees Organizations (GA-HERO) since its inception. He believes local consortiums magnify AROHE’s effectiveness. (Session 9)

Trudy Fernandez (trudy.fernandez@yahoo.com) is President-Elect of AROHE, is Director of Human Resources at Florida International University, providing leadership in planning programs, events, and initiatives to enhance the human resource function. She is a Positive Living Awards committee member for the Alliance for Aging in Miami and Monroe Counties in Florida. (AROHE Plenary 2)

Don Forester (dforester@towson.edu) is a retired behavioral ecologist and current Director of the Towson University Field Station. He was a founding member of the Towson University Retired Faculty Association (TURFA) and served as its first president in 2015. Presently he chairs the TURFA Oral History Project. (REF, Legacy Projects)

Jeri L. Frederick (jeri@ucf.edu) founded and directs the University of California, Irvine’s, Center for Emeriti & Retirees (CER). She has served as Director of the Winona State University Retiree Center since 2014. She has served as the Program Chair of the University Retirees Center of Excellence for the past five years, ending in May. She is on the AROHE Board. (Session 2; REF, AROHE Consultation Service; AROHE Plenary 1 & 2)

Diane Jonte-Pace (djontepace@scsu.edu) is Professor of Religious Studies at Santa Clara University. She previously served as Senior Vice Provost for Academic Affairs, providing leadership in faculty affairs, curriculum development, accreditation, international programs, and other areas. Her current research focuses on institutional support for faculty transitions to retirement. (REF, Legacy Projects)

Caroline Kane (kane@ucb.edu) retired from the University of California, Berkeley, in 2008 and has been involved in retiree activities ever since at the University of California, Berkeley, across the University of California System, and, since 2015, with AROHE. She became AROHE President in 2017 and has focused on sharing lessons from AROHE members with other campuses and universities throughout North America. (Session 6; Session 8; AROHE Plenary 1 & 2)

Jessica Kauphusman (jkauphusman@winona.edu) has served as Director of the Winona State University Retiree Center since 2014. She has provided leadership, management, supervision, and coordination.
AROHE would like to express its appreciation for the work done by the members of the Planning Group to make the 2018 AROHE Conference possible.

CONFERENCE PLANNING GROUP CHAIR: John Bugge, Emory University

CONFERENCE PLANNING GROUP: NON-LOCAL AROHE REPRESENTATIVES

Janette C. Brown, University of Southern California
Patricia Dougherty, University of Washington
Lynn Dull, Washington University, St. Louis
Cherie Hamilton, University of Minnesota
Caroline Kane, University of California, Berkeley
Susan Kress, Skidmore College
Linda Pearson, Ivy Tech Community College
David Stumpf, Northwestern University

CONFERENCE PLANNING GROUP: LOCAL HOSTS FROM EMORY AND GA-HERO

Dianne Becht, Emory University Emeritus College
Missy Cody, Georgia State University
Gray Crouse, Emory University
Dennis Marks, Valdosta State University
Marilyn McKay, Emory University
Marianne Scharbo-Dehaan, Emory University
Gretchen Schulz, Emory University
Kathy Tomajko, Georgia Institute of Technology
Holly York, Emory University
Dorothy Zinsmeister, Kennesaw State University

ALPHABETIZED PRESENTER LIST

Lynn Bailiff (lynnbailiff@comcast.net), President of the University of California’s Retirees’ Association at Berkeley, worked at Berkeley in a variety of capacities to improve the quality of undergraduate education and to make Cal’s undergraduate student body more diverse. After retirement, he managed a private-sector social research company. (Session 6)

Sue Barnes (sbarnes@errc.ucla.edu), a past President of AROHE, is the Director of the Emeritus/Retirees’ Relations Center at UCLA, where she oversees programs and services to keep retired faculty and staff connected to the campus. Earlier, she held management positions at UC-Davis, including Director of the UC-Davis Retiree Center. (Session 6; REF, AROHE Consultation Service; AROHE Plenary 1)

Janette C. Brown (jcbrown@usc.edu) joined the University of Southern California Emeriti Center as its Executive Director in 2005. She serves as the Assistant Vice Provost for the USC Emeriti Center and is an adjunct faculty member at the USC Leonard Davis School of Gerontology. She also is the volunteer Executive Director for AROHE. (Session 8; REF, AROHE Consultation Service; AROHE Plenary 1)

John Bugge (jbugge@emory.edu) is Professor Emeritus of English and Chair of the Executive Committee of the Emory University Emeritus College, which he helped to establish in 2001. A former member of the AROHE Board of Directors, he also chairs the Planning Group for this 9th Biennial Conference. (Session 4)

Ram L. Chugh (ramchugh@gmail.com), Distinguished Service Professor of Economics Emeritus in the State University of New York, left SUNY at Potsdam after many decades for the SUNY System Administration in Albany where he initiated and headed the SUNY Retiree Services Corp. His recent book is The Power of SUNY Retirees: Lessons Learned from Over 100 Retirement Stories. (REF, with Session 6)

Mitch Clifton (mcclifton@westga.edu), a retired Assistant Professor of Computer Science at the University of West Georgia, served as the second President of UWG’s Association of Retired Faculty and Staff from 2016-2018. (REF, Legacy Projects)

Mildred (Missy) Cody (mmcody50@gmail.com) is Professor Emerita of Nutrition and Dietetics at Georgia State University. Her primary academic work and service are in food safety and nutrition policy. She is the immediate Past-Chair of the University System of Georgia’s Retiree Council. (Session 9)

Geoffrey “Geoff” Conrad (conrad@indiana.edu) is Professor Emeritus of Anthropology and sometime Associate Dean of the Faculties and Associate Vice Provost for Research at Indiana University. His research specialty is the archaeology of

**SUNDAY, OCTOBER 7**

11:00–4:00 **Signature Event:** “Only in Atlanta”; bus leaves from ECCH lobby

2:00–6:00 **Conference Registration Opens:** ECCH lobby

2:00–4:00 **Meet Your Hosts:** Emory Emeritus College and Georgia Association of Higher Education Retiree Organizations: ECCH lobby

5:00–7:00 **Reception:** Jones Room and Stuart A. Rose Manuscript, Archives and Rare Book Library, Robert W. Woodruff Library; shuttles leave from ECCH lobby; locals may park in Fishburne Parking Deck

**Banquet:** Cox Hall (across from Woodruff Library; 3rd floor Ballroom)

Welcome from the Conference Hosts:
- Gray Crouse, Director, Emeritus College, Emory University
- Dave Ewert, President, Georgia Association of Higher Education Retiree Organizations, Georgia State University
- Welcome from AROHE and Innovation Award Recognitions:
  - Caroline Kane, President, AROHE Board, UC-Berkeley

**MONDAY, OCTOBER 8**

7:30—Conference Registration continues: outside Lullwater Ballroom

7:30–8:30 Continental Breakfast: outside Lullwater Ballroom

8:30–9:00 **Welcome and Introductions:** Lullwater Ballroom

Welcome from the Chair of the Planning Group for the Conference:
- John Bugge, Co-Founder and Chair of the Executive Committee, Emeritus College, Emory University

Introduction of Emory’s Vice Provost for Faculty Affairs:
- Gray Crouse, Director, Emory University Emeritus College

Welcome from Timothy Holbrook, Vice Provost for Faculty Affairs and Asa Griggs Candler Professor of Law, Emory University

Introduction of our Keynote Speaker
- John Bugge, Co-Founder and Chair of the Executive Committee, Emeritus College, Emory University

9:00–10:00 **Keynote Address:** Lullwater Ballroom

Steven Tipton, Charles Howard Candler Professor Emeritus of the Sociology of Religion in the Candler School of Theology at Emory University

“The Life to Come: Dreams and Doubts of Retirement”

10:00–10:30 Break and Book-Signing: outside Lullwater Ballroom

**SESSION 1: Azalea Room**

**TRANSFORMING THE ALL-IMPORTANT TRANSITION TO RETIREMENT**

“Peer Mentoring to Ease the Transition to Retirement”
In 2016 the Emory University Emeritus College, in collaboration with the university’s Faculty Staff Assistance Program, devised a training program to prepare emeritus faculty to serve as confidential and non-judgmental mentors to active faculty approaching or considering retirement from the university. The mentors meet with their mentees for three one-hour sessions at mutually convenient times. Informal conversations with mentors and mentees indicate that both consider the process to be a positive and satisfying experience.

Helen S. O’Shea, Professor of Nursing Emerita, Emory University
Marilyn Hazzard Lineberger, Director of Faculty Staff Assistance Program Services, Emory University

“Creating a Life One Loves in Retirement: A Seminar for Retired Faculty at UNC-CH”

In 2015, the Retired Faculty Association at the University of North Carolina at Chapel Hill in partnership with the Institute for Arts and Humanities initiated a multi-session, small group seminar program designed to provide newly-retired faculty with the information and support needed to make a successful transition to retirement. The program allows faculty to explore the challenges and opportunities of a new phase in life with colleagues at the same stage of life.

Barbara B. Moran, Professor Emerita, School of Information and Library Science, UNC-CH

“Resilient Aging Lab: Lessons Learned from a Pilot Study at UC-Berkeley”

The Retirement Center at UC Berkeley implemented and evaluated an experimental pilot program called the Resilient Aging Lab, an innovative three-step program designed to build tools, confidence and connections to support retirees and those about to retire. The Session will present a description of the Lab, including some practical exercises, and the lessons learned from the perspective of the UCB Retirement Center, and from the perspective of the designers of the Program.

Cary Sweeney, Director, UC-Berkeley Retirement Center
Michael Pearn, Co-Founder, Resilient Aging Lab LLC, UC-Berkeley

SESSION 2: Oak Amphitheatre

STARTING A RETIREMENT ORGANIZATION

“Building a Retiree Organization: Four Case Histories”

Building a higher education retirement organization is influenced by the organizational context, opportunities, and resources within each institution. Hear the brief history, development, and current activities of Retirement Organizations (ROs) at four different institutions: Winona State University, University of Cincinnati, Skidmore College, and Mount Holyoke College. Speakers will highlight similarities and differences, offering insights on the ways institutional culture, size, resources, and the needs of constituencies influence the creation of successful ROs at very different institutions.

Jessica Kauphusman, Retiree Center Director, Winona State University
James R. Reynolds, Professor Emeritus of Sociology, Winona State University
Carl Huether, Professor Emeritus of Biology, University of Cincinnati

AROHE BUSINESS MEETING

3:30–4:00
All Conference attendees are welcome to attend this meeting.
The agenda will include:
- Election of Officers and Board Members
- Membership categories approved by the Board
- Solicitation for the 2020 AROHE Conference venue
Moderator: Caroline Kane, UC-Berkeley, President, AROHE Board

AROHE OFFICERS 2017-2018
Caroline Kane, President, UC Berkeley
Lucy Eubanks, Secretary, Clemson University
David Stumpf, Treasurer, Northwestern University
Patrick Cullinane, Past President, UC Berkeley

BOARD MEMBERS
Janette C. Brown, Executive Director, University of Southern California
Gray Crouse, Emory University
Lynn Dull, Washington University in St. Louis
Fancy Funk, Florida State University
Cherie Hamilton, University of Minnesota
Carl Huether, University of Cincinnati
Jessica Kauphusman, Winona State University
Joan Merdinger, San José State University
Linda Pearson, Ivy Tech Community College
William Verdini, Arizona State University
Kent Weaver, University of Toronto
representing the 18,000+ retired faculty and staff from the University System of Georgia. We'll also look at what this partnership, in existence for three years, has accomplished so far. How has this new alliance fared in satisfying the needs and expectations of retirees and of the System Office?

Dorothy Zinsmeister, Professor Emerita of Biology, former Co-Chair, Kennesaw State University Retiree Association, former Chair, University System of Georgia Retiree Council

Karim Elliott, Interim Vice Chancellor of Human Resources, Board of Regents of the University System of Georgia

“Service + Travel = Healthy, Meaningful Retirement”

Discover how traveling, volunteering, and leaving your mark on the world can promote better health, enhance the quality of your life, and increase longevity. Learn how volunteering on international and domestic service programs can help you share your gifts, talents, and skills to connect more deeply to a community and tap into your purpose. Explore how you can enlarge your perspective, engage the world for good, and thrive while helping others.

Ruth Curran, Director of Partnerships and Collaborations, Global Volunteers

12:00–1:00 Lunch: Dining Room

1:15–3:00 ROHE PLENARY PANEL AND WRAP-UP:

“Planning for the Future: Re-Creating AROHE’s Efforts to Re-Create Retirement”

Moderator: Caroline Kane, UC-Berkeley, President, AROHE

Caroline Kane and other representatives of AROHE will review plans now in the works to enhance the services AROHE offers its members and increase the support that will enable all involved to re-create retirement in ways beneficial to member institutions and society as a whole. The presentation will first focus on funding plans for AROHE sustainability (including such income as AROHE’s consultation services will provide). Next, the focus will turn to PR and plans for increasing AROHE’s visibility. And finally, we will discuss marketing the more serviceable and more visible AROHE so as to garner buy-in from sources made newly aware of the value of our organization of organizations.

Carl Huether, Professor Emeritus of Biology, University of Cincinnati, Member, AROHE Board

David Stumpf, Chair Emeritus Department of Neurology, Northwestern University, Treasurer, AROHE

Trudy Fernandez, Director, Human Resources Relation, Florida International University, President-Elect, AROHE

Linda Pearson, Staff Emerita Indiana University, Member, AROHE Board

Gail Steinberg, ENCORE fellow working with AROHE

Laura Krestchmer, Professor Emerita of Audiology, University of Cincinnati

Patricia Mezinskis, Professor Emerita of Nursing, President, Emeriti Association Board, University of Cincinnati

Susan Kress, former Vice President for Academic Affairs and Professor of English Emerita, Skidmore College

Colleen O’Connor-Rickey, Academic Administrative Coordinator, Mount Holyoke College

SESSION 3: Mountain Laurel Room

INTEGRATING FACULTY AND STAFF IN RETIREMENT ORGANIZATIONS

“UMBC’s Wisdom Institute: Becoming Inclusive”

The Wisdom Institute at the University of Maryland, Baltimore County has transitioned from a program for emeritus faculty only to one that includes all retirees, faculty and staff, emeritus and non-emeritus. There are no dues or fees. Membership is automatically conferred upon retirement. Our goal is to contribute to the continued well-being of retirees while simultaneously engaging retirees as assets for our campus and broader community. This is a fledgling effort. We will discuss successes and challenges incurred to date.

Diane Lee, Director, Wisdom Institute, UMBC

Diana Smith, Program Management Specialist, UMBC

“Successful Retiree Faculty/Staff Organizations and Collaborations”

Increasingly, retirement organizations in higher education are becoming more inclusive. They are engaging both faculty and staff retirees in collaborative endeavors. Our presenters identify the richness and strength in the diverse range of experiences faculty and staff can share with each other. Learn the stories of the campus cultures that are engaging in such shared programs and activities. Many might be inspirational for your own campus.

Janette C. Brown, Assistant Vice Provost, USC Emeriti Center & Emerita College

Victor Marshand Webb, Professor of Communication and Journalism Emeritus, USC, USC Retired Faculty Association, USC Emeriti Center

Michael Klineman, retired USC staff, retired Santa Monica City College faculty, President, USC Retired Staff Association

12:00–1:00 Lunch: Dining Room

1:15–2:15 ROHE PLENARY PANEL Lullwater Ballroom

“Jumpstart Your Retiree Organization with the AROHE Consultation Service”

Are you interested in starting a retirement organization at your institution? Or is your established organization in need of ideas for growth and development? This session will highlight ways that AROHE’s consultation services can help start, maintain, and grow retirement organizations (ROs). AROHE consultations, available for a reasonable fee, might include site visits or virtual sessions, e-mail and/or telephone consultations, meetings or virtual meetings with campus and/or retiree leaders, questionnaires/surveys of retirees and/or administrators, and a culminating report of recommendations tailored to your situation. Let the AROHE experts save you time and money by leveraging the knowledge they have gained in developing successful retirement organizations.
Moderator: Carl Huether, Professor Emeritus of Biology, University of Cincinnati, Member, AROHE Board
David Stumpf, Chair Emeritus Department of Neurology, Northwestern University, Treasurer, AROHE
Sue Barnes, Director, UCLA Emeriti/Retirees Relations Center, Past President, AROHE Board
Janette C. Brown, Assistant Vice Provost, USC Emeriti Center & Emeriti College, AROHE Executive Director

2:30–3:00 SPONSOR SPEAKERS: Lullwater Ballroom
- Introduction: John Bugge, Executive Committee Chair, EUEC
- David Nussbaum, Executive Vice President, Belmont Village

“The Journey from Association of Professors Emeriti to Emeritus College”

Stuart Donovan, Director, Individual Advisor Services, TIAA Financial Services, Greater Atlanta Area

TIAA: “The Dos and Don’ts of Managing Finances in Retirement”

SESSION 4: Oak Amphitheatre

THE EMERITUS COLLEGE MODEL OF A RETIREMENT ORGANIZATION

Moderator: John Bugge, Professor Emeritus of English, Co-Founder, Emeritus College, and Chair of the EUEC Executive Committee

“Thirteen Years Later: The Evolution of the Emeritus College at ASU”

William Verdini will present a brief history of the founding of the Emeritus College at Arizona State University, discuss the co-existence of multiple retirement organizations at an academic institution, and address the challenges/opportunities ahead.

William Verdini, Dean Emeritus, Arizona State University Emeritus College

“How Clemson Developed a Successful Emeritus College”

Components of Clemson’s successful Emeritus College include excellent perquisites for emeritus faculty, valuable free services provided by emeriti, a shared vision for the college among emeriti and administrators, excellent communications, aggressive branding, and careful attention to detail. The financial value of services provided by emeriti and an increase in age-appropriate faculty retirement more than offset the expense of maintaining Clemson’s Emeritus College.

Hoke S. Hill, Professor Emeritus of Applied Statistics, Clemson University

“The Journey from Association of Professors Emeriti to Emeritus College”

In contrast to the “classical” retirement model, involving the concept of severance or withdrawal, the plan for the UBC Emeritus College sees emeriti and other retired members of the academic community still situated on a continuum of involvement with the University, in which they will find opportunities for commitment in three major areas: individual personal growth and enrichment, university and community service, and ongoing scholarly activity in both teaching and research.

Stephen Tredwell, Professor Emeritus of Orthopaedic Medicine, Co-Founder, University of British Columbia Emeritus College

Jean O’Neil, Associate Professor Emerita of Nursing, former President, Boston College Association of Retired Faculty

“How Sustaining and Growing Your Retirement Center”

Moderator: Caroline Kane, UC-Berkeley, AROHE President

Institutional funding for retirement centers is critical. Changes in that funding happen quickly with a change in institutional leadership or a crisis in institutional budget. Maintaining a retirement center and growing it during and after challenges can disrupt the sleep of Center Directors (and their retirement organization leaders). Our discussants have strong experiences with challenges. They will share those experiences and tips on working through all the issues.

Jeri Frederick, Director, UC Irvine Center for Retirees and Emeriti
Janette C. Brown, AROHE Executive Director, Assistant Vice Provost, USC Emeriti Center & Emeriti College

SESSION 9, Azalea Room

PARTNERS IN RE-CREATING RETIREMENT

“Extending the Reach of our Emeritus and Retired Faculty Association: Intentional Collaborations and Academic Synergies”

In this session, we describe collaborations between the Emeritus and Retired Faculty Association (ERFA), the Center for Faculty Development (CFD) and the University Library (UL) at San Jose State University. We discuss how these intentional partnerships emerged, and how they enable ERFA to expand its reach while assisting the campus in advancing its mission.

Amy Strage, Assistant VP for Faculty Development, San José State University
Joan Merdinger, Professor Emerita of Social work, formerly AVP for Faculty Affairs, San José State University, President, SJSU Emeritus and Retired Faculty Association

“GA-HERO: Georgia’s Statewide Higher Education Retiree Organization”

GA-HERO (Georgia Association of Higher Education Retiree Organizations), a network of higher-education retiree organizations, holds semi-annual meetings that include presentations by experts (2017/18 Year of Wellness: Food and Fitness after 50, The Happiness Secret, What’s Next in Healthcare Delivery), sharing of best practices from unit retiree organizations, and networking among colleagues. Member organizations of GA-HERO are members of AROHE. This presentation will focus on initiating and growing local collaborative retiree organizations.

Missy Cody, Professor Emerita of Nutrition and Dietetics, Georgia State University, immediate Past-Chair of the University System of Georgia Retiree Council
Dave Ewert, Professor Emeritus of Finance, Director Emeritus, Executive MBA Program, Georgia State University, President of GA-HERO

“How Creating a System-Wide Partnership for Retirees”

We’ll look at creating a system-wide Retiree Council (one representative from each of 26 Georgia public institutions of higher education plus System Office personnel)
The presentation will profile the International Science and Engineering Fair (ISEF), the largest and most prestigious high school event in the world, and the effort spearheaded by the Emeritus College at Arizona State University to help Arizona students excel at this level of competition. The talk will include a description of the ISEF-AZ Program as well as its outcomes and benefits and how it can be replicated at other retirement organizations.  

(Innovation Award Winner 2018)

William Glaunsinger, Professor Emeritus of Chemistry, Assistant Dean of Sciences and Professions, Arizona State University Emeritus College

Lorna Glaunsinger, ISEF Caucus Liaison, Arizona State University Emeritus College

“Language Skills Support for International Students”

The mission of the Clemson University Emeritus College is to provide continued service to students, faculty, the university, and the community. Their Language Skills program includes two parts: the Clemson English Speaking Proficiency Test (assessment of English communication skills for international graduate teaching assistants) and the Conversations with International Students (one-on-one mentoring for students seeking to improve their English communication skills). Program results demonstrate that participating students significantly improve their language skills.  

(Innovation Award Winner 2018)

M. Elaine Richardson, Professor Emerita, Animal and Veterinary Science, Clemson

“Keeping Up with Current Events”

In 2016, our Emeriti House Advisory Board approved a new program, “Current Events at Emeriti House,” a nonpartisan discussion group that meets regularly to discuss the news of the day, referencing careful reading of relevant material. Because such discussions involve matters about which intelligent and reasonable people can disagree, a moderator system organizes the meetings based on rules defining the respective roles of moderator and participant. The result? Lively and collegial exchange enjoyed by all.

Eugene B. McGregor, Professor Emeritus, School of Public and Environmental Affairs, Director, Indiana University Emeriti House

Geoffrey Conrad, Professor Emeritus, Anthropology, Co-Chair, Indiana University Emeriti House Program Committee

SESSION 8, Oak Amphitheatre

SUSTAINING AND GROWING RETIREMENT ORGANIZATIONS: KEEPING IT GOING

“Boston College: Getting Us Going/Keeping Us Growing”

Our 15-year-old Association of Retired Faculty meets monthly to hear faculty and administrators review research, teaching, and culture at the university, and runs a monthly members’ research seminar and a monthly book club, as well as a yearly newsletter and a modest grants program. Presenters will stress the generation of the group, follow the evolving enlistment of university support and return on investment by our group, and outline plans for the future.

Judith Wilt, Professor Emerita of English, Secretary, Boston College Assoc of Retired Faculty

Jean Mooney, Professor Emerita, School of Education, member, Boston College Association of Retired Faculty

SESSION 5: Mountain Laurel Room

CREATING COMMUNITY: COMMUNICATING IN REAL AND CYBERSPACE

“Developing a Quality Retiree Journal and Website”

Participants in the session will be given a copy of the most recent FSU Association of Retired Faculty (ARF) Journal and the presenter will briefly share the methods used to improve communications with retirees at Florida State University. Most of the session will be answering questions that participants might have.

Thomas L. Hart, Professor Emeritus, Editor, ARF Journal, Florida State University

“Communication Tools for Your Various Constituencies”

A college or university retirement organization has at least three constituencies: the entire university, potential members in the university who are nearing retirement, and members of the RO. Communication strategies for each constituency will be discussed, with an emphasis on practical approaches and the advantages of each tool.

Gray Crouse, Professor of Biology, Director, Emory University Emeritus College

SESSION 6: Azalea Room

ESTABLISHING VALUE: SERVING OUR INSTITUTIONS AND COMMUNITIES

“Department Emeriti Representatives”

This program amplifies voices of emeriti from all departments and units about their “on-the-ground” experiences. The outcomes have been both better-informed administrators and emeriti, and an enhanced experience for all during and after the transition to retirement. Improved communication increases the visibility of emeriti in their departments and with campus administrators; exchanges about emeriti issues often reach senior administrators; and the results include advocacy for emeriti as well as more social-personal interaction among emeriti from different disciplines.

Caroline Kane, UC-Berkeley, AROHE President

Cary Sweeney, Director, UC-Berkeley Retirement Center

“UC Retirees: Advocates, Ambassadors, Assets”

Retirement organizations are often challenged with demonstrating the value of retired staff/academics. A recent survey report, published by the University of California Retirees Associations (CUCRA), offers compelling data suggesting that many retirees remain curious, vibrant and productive, with a commitment to civic engagement and public service. Learn how the survey was developed and conducted and, more importantly, how the report is being successfully used to educate campus/community leaders, create collaborations and advocate for retirees.  

(Innovation Award Winner 2018)

Sue Barnes, Director, UCLA Emeriti/Retirees Relations Center

Lynn Bailiff, President, University of California Retirees’ Association at Berkeley

4:30–6:15 RESOURCE EXCHANGE FAIR

Garden Overlook, Salon, and adjacent areas

People from every presentation scheduled in our Concurrent Sessions will also be presenting at the Fair, ready to pursue conversation about the programming at their home institutions and illustrate its value with displays on posters and laptops and handouts that will let you take their best ideas home. You’ll have two hours to browse among tables “clustered” by the Session topics these people (and a few others invited for additional presentations) represent.
4:30–6:15 RESOURCE EXCHANGE FAIR

From Session 1: TRANSFORMING THE ALL-IMPORTANT TRANSITION TO RETIREMENT
“Peer Mentoring to Ease the Transition to Retirement”
“Creating a Life One Loves in Retirement: Seminar for Retired Faculty at UNC-Ch”
“Resilient Aging Lab: Lessons Learned from a Pilot Study at UC-Berkeley”

Additional REF Only Presentations:
“Faculty Experiences in Phased Retirement Programs: Helping Institutions and Retirement Organizations Support the Transition to Retirement”
Amy Strage, San José State University
Joan Merdinger, San José State University
Diane Jonte-Pace, Santa Clara University

“Currently Retiring and Retired Faculty Thoughts Regarding Retirement”
Burton Marcus, University of Southern California

From Session 2: STARTING A RETIREMENT ORGANIZATION
“Building a Retiree Organization: Four Case Histories”

From Session 3: INTEGRATING FACULTY AND STAFF IN RETIREMENT ORGANIZATIONS
“UMBC’s Wisdom Institute: Becoming Inclusive”
‘Successful Retiree Faculty/Staff Organizations and Collaborations’

From Session 4: THE EMERITUS COLLEGE MODEL OF A RETIREMENT ORGANIZATION
“Thirteen Years Later: The Evolution of the Emeritus College at ASU”
“How Clemson Developed a Successful Emeritus College”
“The Journey from Association of Professors Emeriti to Emeritus College”

From Session 5: CREATING COMMUNITY: COMMUNICATING IN REAL AND CYBER-SPACE
“Developing a Quality Retiree Journal and Website”
“Communication Tools for Your Various Constituencies”

From Session 6: ESTABLISHING VALUE: SERVING OUR INSTITUTIONS AND COMMUNITIES
“Department Emeriti Representatives”
“UC Retirees: Advocates, Ambassadors, Assets”

Additional REF Only Presentations:
“UWRA and the Encore Program: Promoting UW Retirees as Resources”
Míceál Vaughan, University of Washington
Margi Wadden: University of Washington
“The Power of SUNY Retirees: Lessons Learned from Over 100 Retirement Stories”
Ram L. Chugh, SUNY System Administration
(in absentia, publication will be available)

From Session 7: CELEBRATING SUCCESSFUL PROGRAMS AND SERVICES
“ISEF-AZ Preparatory Program”
“Language Skills Support for International Students”
“Keeping Up with Current Events”

From Session 8: SUSTAINING AND GROWING RETIREMENT ORGANIZATIONS
“Boston College: Getting Us Going/Keeping Us Growing”
“Sustaining and Growing Your Retirement Center”

From Session 9: PARTNERS IN RE-CREATING RETIREMENT
“Extending the Reach of our Emeritus and Retired Faculty Association: Intentional Collaborations and Academic Synergies”
“GA-HERO: Georgia’s Statewide Higher Education Retiree Organization”
“Creating a System-Wide Partnership for Retirees”
“Service + Travel = Healthy, Meaningful Retirement”

Additional REF Only Presentation:
“Using Students to Conduct Retiree Organization Assessment”
Aurea K. Osgood, Winona State University
Jessica Kauphusman, Winona State University

“Honoring Contributions of Retirees”
Susan Kress, Skidmore
Amy Strage, San José State University
Diane Jonte-Pace, Santa Clara University

“Celebrating Retirees through a Tribute to Retirees Commemorative Booklet”
Anne Richards, University of West Georgia
Mitch Clifton, University of West Georgia

“TURFA Oral History Project”
Donald Forester, Towson University

SPECIAL CLUSTER: AROHE CONSULTATION SERVICE & ENCORE
Carl Huether, University of Cincinnati, Member, AROHE Board
Sue Barnes, UCLA, Past President, AROHE Board
Janette C. Brown, USC, AROHE Executive Director
ENCORE: “Changing the Story About Aging”
Gail Steinberg, ENCORE Fellow with AROHE

SPONSOR TABLES:
Belmont Village: “The Community Built for Life”
David Nussbaum, Executive Vice President, Belmont Village

TIAA: “The Dos and Don’ts of Managing Finances in Retirement”
Stuart Donovan, Director, Individual Advisor Services, Atlanta Area TIAA

Atlanta Dine-Around
6:30 ATLANTA DINE-AROUND
drivers leave from the ECCH lobby

TUESDAY, OCTOBER 9

7:30— Conference Registration continues: outside Lullwater Ballroom
7:30–8:30 Continental Breakfast: outside Lullwater Ballroom
8:30–9:00 Welcome and Introductions: Lullwater Ballroom

John Bugge, Co-Founder and Chair of the Executive Committee,
Emeritus College, Emory University

Introduction of our Keynote Speaker
Amy Strage, Assistant Vice Provost for Faculty Development, San José State University

9:00–10:00 Keynote Address: Lullwater Ballroom
Roger Baldwin, Dr. Mildred B. Erickson Distinguished Chair in Higher, Adult, and Lifelong Education, Michigan State University

“Reinventing Academic Retirement: Where Are We Now?”

10:00–10:30 Break and Book-Signing: outside Lullwater Ballroom

10:30–11:45 ROUND 3 CONCURRENT SESSIONS

SESSION 7, Mountain Laurel Room
CELEBRATING SUCCESSFUL PROGRAMS AND SERVICES
“ISEF-AZ Preparatory Program”