

## AROHE Idea Exchange: Member Meet-Up, February 25, 2021

### Breakout Room Notes

#### Room 1:

- Joan Merdinger, Facilitator, San José State University, SJSU Emeritus & Retired Faculty Association
- Beryle Baker – Perimeter College - Georgia State University, GPC/DeKalb College Retiree Association
- Lisa Earle – Cornell University, Cornell Academics & Professors Emeriti
- Roger Elmes – Kwantlen Polytechnic University, KPU Retirees Association
- Al Hermsen – University of Michigan Retiree Association
- Diane Lee – University of Maryland Baltimore County (UMBC), Wisdom Institute
- Loy Lytle – UC Santa Barbara, UCSB Emeriti Association
- Sooz Klinkhamer – Kwantlen Polytechnic University, KPU Retirees Association

#### Recruiting Board Members/volunteers

- Al Hermsen, University of Michigan - a person in the RO is tasked with, and is very effective at, recruiting new board members. The Board member who does recruitment has done this for 10 years. The board carefully reviews all recommended retirees to ensure that they will be contributing members of the Board, and that new members will be willing to take on needed tasks. The Board reviews CVs of prospective Board members.
- Lisa Earle, Cornell - the Executive Council goes over a list of recently retired faculty and invites potential members to join the Council. Effort goes into making sure that Council members are representative of 10 or more of the Cornell Colleges.
- Roger Elmes, Kwantlen Polytechnic University - discussed the benefits of having virtual meetings during the pandemic. Members can now attend meeting and events even if they live at a distance.
- Al Hermsen, University of Michigan - reported that they now have Board members in Florida who are able to participate. In the past, that wasn't possible.

#### Reaching Potential Members/Getting Information from HR

- Diane Lee, UMBC - described a close relationship with HR from the beginnings of the Wisdom Institute. The Institute helped HR with pre-retirement transition materials and information, and HR gives out - to all retirees - brochures, letters, information about the Wisdom Institute website, and a certificate informing each retiree that he/she/they is/are members of the Institute upon retirement. HR staff attend meetings in an Ex Officio role.
- Al Hermsen, University of Michigan - discussed the good relationship the Retirees Association has with HR; HR representatives attend their Annual Meeting and are on the agenda to speak about benefits. The Annual Meeting is held during benefits "open enrollment," and the Retirees Association members find this to be very helpful. In addition, the Retirees Association hosts HR liaisons at 1-2 Board meetings yearly. HR provides a list of retirees to the Association; the Association sends out invitations to join.
- Roger Elmes, Kwantlen Polytechnic University – using Facebook and LinkedIn, Roger and others were able to locate a good number of retirees to get the organization started. However, there has been no support from HR due to confidentiality concerns. Roger asked for additional suggestions for locating retirees.
- Lisa Earle, Cornell University, discussed the importance of University retirement events and receiving the names of all the recent retirees who have been invited. This helps with ongoing recruitment. After the names are received, retirees are sent a "Welcome from CAPE" letter, informing them that they are now members. All retired faculty and emeriti are automatic members.
- Loy Lytle, UC Santa Barbara, discussed that his organization has trouble with getting information about recent retirees due to privacy concerns. There is a half-time staff member in the UCSB retirement center who works with both faculty and staff retiree organizations. The first year of membership is free, but it has been difficult to reach recent retirees to inform them about their membership.
- Joan Merdinger, SJSU ERFA - HR staff members send out a "Welcome to ERFA" letter and an ERFA application form to a list of recent faculty retirees that HR has available. Although ERFA does not know the names of those who received emails from HR, this method has worked for a number of years. The names are kept confidential

by HR, but interested retirees fill out the application form and return it directly to the Membership Committee. ERFA also receives the names of faculty who are invited to the faculty retirement annual reception.

Lisa Earle asked if any of the retiree organizations had information about what to do when a member dies? What happens with email, papers, grants?

- Al Hermsen, University of Michigan - HR provides a list of names of faculty and staff who have passed away. He also noted that spouses are also members of the Retiree Association.
- Beryle Baker, Perimeter College Georgia State University, suggested that for this topic, participants in this group might look at the “Death Café” to deal with end-of-life issues. The website is: <https://deathcafe.com/what/>
- Diane Lee, from UMBC, noted that University legal counsel had informed the Wisdom Institute that they could not include information about members who had died. Attendees suggested that Diane find a number of retiree newsletters that included “In Memoriam” columns with names and identifying information of staff and faculty who had passed away and share that with legal counsel.

#### **Room 2:**

- Susan Kress, Facilitator, Skidmore University
- Shu Bernadin, St. John’s University
- Jessica Casselman, Washington State University
- Caroline Kane, UC Berkeley Emeriti Association
- William Licamele, Georgetown University Association of Retired Faculty & Staff
- Linda Pearson, Ivy Tech Community College of Indiana
- Jim Reynolds, Winona State University Retiree Center
- Bill Verdini, Arizona State University Emeritus College (20 minutes)
- Jakob Waterborg, University of Missouri-Kansas City Emeritus College

#### **Reaching potential members:**

- Chancellor sends letter to award emeritus status: RO piggy backs on that letter to offer complimentary membership in RO for first year; 50% of retirees become permanent members (UMKC).
- HR director alerts potential retirees to existence of RO
- HR asks potential retirees if their names and emails can be shared with the RO
- Some HR directors do provide list of retirees to ROs (Georgetown)
- Newsletters help publicize RO and its activities and programs
- Staff at some institutions cannot keep their email addresses, which makes communication challenging.
- Advocate for retention of institutional email address as a general retiree privilege.
- Reach out to pre-retirees (or whole campus) and invite them to programs (Winona State).
- New retirees invited to a lunch of all retirees and are honored.
- Retirement Center Director sends email to potential and new retirees on RO’s behalf; sends newsletter, too. A new website will enable new retirees to share info if they choose with the RO (Berkeley)
- If retirees are honored at public institutional event, RO can get list of names (Skidmore)
- Send postcards to all retirees; try to stay connected to whole group (Georgetown)

#### **Recruiting and energizing Board members:**

- Most Boards recruit through personal outreach, not nominations and elections.
- But—if you want diversity (of all kinds) you need other strategies and training from people expert in outreach.
- A good committee system with meaningful tasks and clear deadlines for work keeps folks energized
- Zoom has helped to get people to meetings and keep meetings frequent.
- Shared different models for Advisory Boards and Executive Committees.
- Boards range in size from 17 (Winona State) to 10 (Georgetown).
- ROs varied in institutional or other support for paid staff. Most ROs operated on a volunteer basis.

- Georgetown hired a Communications grad for a few months to assist with social media, mailchimp, newsletter; well worth the money.
- Winona State's Board members serve for a max of two 4-year terms. The first 4 years they learn the ropes, the second 4 they really contribute. Terms are staggered.

#### **How do ROs serve their institutions and community:**

- Mentorship: of undergrads, grads, faculty/staff (peer-to-peer).
- Mentoring non-native speakers to help with how to write graduate-school papers.
- Conduct survey of retirees to ascertain their service and accomplishments; line those up with the State Labor Department guidelines to ascertain dollar value of contributions (Winona)
- Have retirees speak to alumni groups (Georgetown)

Facilitator referred group to Briefs, especially the Brief on Philanthropy and Service, The University of California Retiree Survey, and the Clemson Language Skills Program. Also directed group to survey resources on the AROHE website.

#### **Room #3:**

- Kent Weaver, Facilitator, University of Toronto
- Charles Davidshofer, Society of CSU Faculty/AP Staff Retirees, Colorado State University
- Janet DeLany, Towson University Retired Faculty Association (TURFA), Towson University
- Nancie Fimbel. Emeriti & Retired Faculty Association, San Jose State University
- Tim Hegstrom, SJSU ERFA, San Jose State University
- Nicholas Lovrich, Dept. of Political Science, Washington State University
- Jan Morlock, University of Minnesota Retirees Association
- Jane Wolfson, Towson University Retired Faculty Association (TURFA), Towson University
- Temporary participant: Bill Verdini, Emeritus College, Arizona State University

#### **Post-Covid-19 Operations:**

- There was consensus that in the future there will be a return to face-to-face meetings, a continuation of virtual events and that some events will entail a mix of the two.
- There is interest in enhancing the online experience. It has led to more member involvement and has eliminated geographic barriers. There is an expectation that broadcasting can significantly improve the virtual environment.
- Jane – talking to her University IT about support
- Jan – looking to volunteers for production –to involve more people and to control cost
- Nicholas – getting together is important; virtual is not always culturally sensitive; personal connections crucial
- Nancie – looking at a beta software product

#### **Fostering more involvement in a retirement organization**

- Jane – need to get more people involved beyond core membership – establish more committees and provide scope to foster that involvement
- Jan – have new member sessions and promptly follow-up – her association sends out an interest survey – personal touch makes a difference -use multiple gateways, including Facebook
- Tim – put new people on your Board – get them involved from outset – your membership has past experience and ready to exercise leadership
- Nancie – cautionary note: keep an eye on size of the Board – too big is cumbersome
- Nicholas – more recognition and use of awards – be aware that newer retirees may have different expectations
- -echoes Jan's previous comment about surveys

## Room #4

- Arlene Cratsa – Facilitator

### Reaching potential members/getting info from HR

- Partner with HR to get list of those retiring
- Send letter via snail mail to recruit members instead of email
  - One university had a digital divide with those over 65 who don't check their emails on a regular basis, or their computers are not working well.
- Send out packets at the end of the fiscal year to recruit retirees
- Have development hold talks on retirement
- Before pandemic, got in touch with people before they retired to have a reception to congratulate them and let them know about the Retirees Association. Made sure to invite current employees so they could learn as well.
- Gave retiree newsletters to prospective retirees
- Target employees 5 years before they retire – recruitment starts there
  - Hold pre-retirement planning courses and workshops
- Held retirement party at Chancellor's Office to celebrate upcoming retirements. Gave them card with contact information to the Retirees Association so they could keep engaged.
- Welcome retirees back to campus. "Welcoming family home to campus" – invite current employees to get them ready for retirement.
- Keep faculty/physicians engaged. Have separate workshop for them. It is a very different group.
- Get list of anyone drawing a pension, get retirement date and even date someone passes away. Information is confidential and you must adhere to confidentiality.
- Open enrollment – reach out to retirees during this time.

### Getting financial support from the college/university

- Make the case for retirees and the financial contributions they make to the university as well as their service to the community.
- Increase dues?
- Get donations through sponsorships
- Potential giving groups:
  - Work with local credit unions
  - Reach out to financial institutions
  - Partner with retirement communities
- Make sure your association is mission-driven: fulfillment, learning, potential customers, brand recognition, promote programs
- Keeping faculty engaged – financial support
  - Assist faculty transitioning into retirement
  - Offer an incentive package to retire
  - Ask them to stay on after they retire to assist the campus
  - Show value – there is a place to go, you add value
  - Wrote a proposal & received \$50,000 to cover this progra

### Recruiting board members/volunteers

- Bring in campus leaders to speak with board members
- Bring in different community representatives
- Complimentary parking pass to park on campus
- Zoom meetings – no need to travel to meetings

### Virtual social program ideas

- IITS can do workshop on streaming TV, Hulu, Zooming basics, etc.
- Virtual travel
- Live opera performance or any live music

