

Association of Retirement Organizations in Higher Education

AROHE

**Our national headquarters is planning to move.
Would you like us to make our new home on your campus?
Respond to this request for proposal (RFP)**

Here is your invitation to qualify for the opportunity to host AROHE's national headquarters on your campus. As you know, AROHE is an association of academic retirement organizations across the US and Canada. We represent 100 member organizations and 100,000 retirees. For a list of member organizations, see our site at <https://www.arohe.org/MemberList>.

Why new headquarters? AROHE has been hosted by the University of Southern California since 2002. USC provided extensive support until budget restrictions made support challenging. As a result, AROHE is releasing this Request for Proposal to its member colleges and universities to determine which campus location would be most likely to create a win-win partnership between themselves and AROHE.

Why now? Expanded aspirations of AROHE

- Because increasing numbers of faculty and staff are retiring, membership is growing along with an increased need for services. AROHE supports the growth of retirement organizations (ROs) at many institutions of and supports both the retirees and institutions that would like to form ROs. We intend to shift from relying on volunteer staff to hiring a paid Executive Director and Executive Assistant.
- AROHE aims to become the internationally recognized "go to" group for working with retirees in higher education. With dedicated, paid staff members, AROHE will be of greater service more immediately to its membership, campus leadership and to other organizations focused on the well-being of retirees.
- AROHE intends to expand resources for college and university administrators working to establish positive relationships with retirees and with those considering retirement.

Why do you want AROHE's new location to be on your campus?

- You will be able to use the AROHE home office as a powerful source of information and networking for your own activities on behalf of your retirees.
- It's no small thing to enjoy the prestige of being recognized as the home base for an international, innovative organization that affects positive change in retirement for faculty and staff in higher education.

- **Current Profile of AROHE:** AROHE is an association of retirement organizations of colleges and universities across North America. We also welcome administrators and the retirees themselves as members. The volunteer Board of Directors attends to the fiduciary responsibilities of AROHE as well as themselves being volunteers in membership, finance, communications and other activities needed to maintain and expand the breadth of organizational activities. These activities include a bimonthly newsletter and a biennial conference happening for the ninth time this October in Atlanta, production of white papers on best practices in retirement, as well as sponsorship of regional meetings. AROHE intends to share support for the Executive Director and Executive Assistant with the new Home Institution.

The current home office arrangements include a location for the volunteer Executive Director who is a full-time director of the ROs at the University of Southern California. Her office, which supports AROHE, has covered some costs for telephone, internet, equipment and computer services, and minimal support for duplication and printing. The work study students—who handle the AROHE phone calls, emails, newsletter formatting, and internet communications with members—are paid by AROHE. Board Members operate remotely, and the Treasurer handles the AROHE bank account and most transactions. The main office assists heavily with the Biennial Conference in collaboration with the conference hosting institution. The Board Members provide consultation services for member organizations and also prepare and post white papers on best practices in retirement; these are accomplished remotely but in full coordination with the Home Office.

REQUEST FOR PROPOSAL PROCESS

Interested institutions are invited to submit formal proposals that will be evaluated by a Committee of Board Members along with the current Executive Director. AROHE leaders will visit lead candidate institutions prior to making a final decision.

ITEMS TO ADDRESS IN THE PROPOSAL (IN A NARRATIVE FORMAT):

- Rationale for your institution's hosting AROHE
- Evidence that you have a robust local retirement organization
- Evidence of high level administrative support for hosting AROHE
- Details of rent-free office spaces for an Executive Assistant; if the Executive Director is also local, rent-free office space would be needed as well
- Details of provision for access to shared resources
 - Telephone, copier, computer
 - Use of a conference room
 - High speed internet connections
 - Printer

TIMELINE

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| September 15, 2018 | Deadline for organizations to express an interest by email or letter. This might include requests for clarifying information. |
| October 15, 2018 | AROHE will deliver clarifying information requested (and throughout the process) |
| January 15, 2019 | Deadline for submitting proposals |
| February 2019 | Site visits to selected institution(s) |
| March 15, 2019 | Final decision on AROHE Home Office location |
| July 1, 2019 | Home Office opens at selected location |

COMMENTS: The bulleted list of items to address in the RFP is fairly general. Details of the relationship between AROHE and the host institution will be spelled out in a memorandum of understanding once a decision has been made.

SUBMIT COMPLETED RFP TO:

AROHE
835 West 34th Street, URC 103
Los Angeles, CA 90089-0751

OR kanecm@berkeley.edu



AROHE HOME OFFICE REQUEST FOR PROPOSAL INFORMATION

DATE:

INSTITUTION:

CONTACT PERSON:

CONTACT PHONE NUMBER:

CONTACT EMAIL:

INSTITUTIONAL ADDRESS:

RETIREMENT ORGANIZATION NAME:

RETIREMENT ORGANIZATION CONTACT:

RETIREMENT ORGANIZATION PHONE NUMBER:

RETIREMENT ORGANIZATION EMAIL:

RETIREMENT ORGANIZATION ADDRESS:

For further information or answers to your questions, please contact Caroline Kane, AROHE President, at kanecm@berkeley.edu or 510-502-1693, or the AROHE Office at info@arohe.org, (213) 740-5037