

AROHE 2014 Conference Report

A summary of takeaways from conference workshops

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About AROHE (Association of Retirement Organizations in Higher Education)

AROHE, the only 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 the creation of new models of retirement.

About the AROHE 2014 Conference

The AROHE biennial conference, hosted by the University of Minnesota Retirees Association (UMRA), offered a pre-conference workshop, a conference orientation, a welcome reception, a keynote address, a plenary address, 17 different workshops, a Member Showcase, networking breakfasts and a member town hall meeting. Additional details are provided in the “Session details” sections of this report.

Attendance at a glance

The conference was attended by seasoned retiree organization leaders, retirees interested in starting an organization and campus administrators wanting to connect more effectively with retired faculty and staff.

110 attendees, including representatives from:

Retired Faculty & Staff Association	29	Campus Department	14	Guest	2
Retired Staff Association	11	Retiree/Emeriti Center	14	Sponsors	4
Retired Faculty Association	20	Emeriti College	6	Other	10

Pre-Conference Workshop: AROHE Academy: Starting a Retiree Organization

Takeaways:

- Understand the culture and politics of your campus. Identify strengths and opportunities for success.
- There is no substitute for developing relationships and finding one or two high level champions to support your endeavors. Take them to lunch.
- Survey your retired faculty and staff to determine their interests and needs.
- Do your research through the AROHE website and get help from other AROHE members.
- Gather stories about the value that your retirees can provide the campus and community. Emphasize that retirees can not only be ambassadors and fund raisers but also volunteers, mentors, teachers, moderators, researchers, writers, editors, provide historical memory, etc. They can be valuable assets to promote the reputation and visibility of the institution and can also be hosts for VIPs who visit campus.
- Stay in contact with your campus champions and supporters through correspondence, holiday cards, event invitations, thank you gifts and recognitions.
- Provide your administration with an annual report highlighting your accomplishments.
- Be creative with finding funds. Shared space, office support and funding might be provided from development/foundations, HR (Human Resources), Alumni Association, Benefits Office, Chancellor/Provost, etc.
- Ask different departments how the retirees might help and then plan to assist with willing volunteers.
- Remember that you are or can be an interdisciplinary, multigenerational, multicultural organization. Programs that integrate these can be powerful, interesting and unique.
- Wellness events are very popular and can engage the non-retired as well as retired faculty and staff across the lifespan. Partnering across disciplines to provide events engaging all will raise visibility and value for your organization.

Session takeaways—day one

Panel: Building Retirement Organizations

Carol Pope, Kennesaw; Carl Huether, University of Cincinnati; Sue Barnes, University of California, Davis; David Ewert, Georgia State

This panel discussed different phases in the life cycle of retiree organizations—a relatively new organization that is in a period of growth; a mature organization that experienced a period of inactivity and a resurrection; a campus-funded retiree center that was created after retirees’ demonstrated a return on investment for the campus and an AROHE mentoring program that assists organizations in their early stages of development.

Takeaways:

Kennesaw (new organization)

- Need to have a sparkplug (or two or three)!
- Garner support from key campus constituents
- Form a focus group
- Consider retiree perspective; survey retirees
- Determine form and mission of organization
- Try things and be willing to adapt to meet retirees’ changing interests

University of Cincinnati (resurrected organization)

- Determining significant financial contributions of Emeriti to UC
- Aroused interest of administration
- Met with university VIPs
 - Emphasized what Emeriti offer
 - Proposed specific activities
 - Requested support for activities
- The results:
 - Listserv and website created for Emeriti
 - Increased benefits for Emeriti
 - Improving process of gaining Emeritus status university-wide
 - Greater collaboration on events
 - Bus tour introduction to city for new faculty in August
 - Establishing two student mentorships to work with active Emeriti on scholarly activities

UC Davis (demonstrating R.O.I. for campus-funded retiree center)

- Wiggle your way in (weave your way into campus life; make your organization useful)
- Develop partnerships (with key campus departments)
- Toot your own horn (publicize retiree accomplishments and contributions)
- Identify champions (key campus administrators and well-respected retirees)
- Submit written proposal (to include campus needs & how organization can add value/further mission, budget/funding sources and space needs)
- Repeat steps as necessary (this take several years)

AROHE mentoring and consortia

- Use the resources available through AROHE; any problem faced by a member organization has likely already been faced by another AROHE member
- Reflections on ROI (Return on Investment)
 - $ROI \% = (\Delta \text{Benefits} - \Delta \text{Costs}) / \Delta \text{Investments}$
 - “You get what you measure”
 - VP Finance must use resources to strengthen school
 - “We don’t have the money.” They have the money! Get your share. Show you’re a better investment.
 - Guidance: How are alumni associations evaluated? What’s their ROI? What metrics?

Presentation: The SUNY Retirees Network: Connecting Retirees in the Digital Age

Julie Petti and Pierre Radimak, State University of New York System Administration

The SUNY Retirees Network (SRN) connects SUNY retirees throughout the 64-campus system via a secure online directory, promotes online interaction and connects retirees with volunteer opportunities.

Takeaways:

- Retirees surveyed by the SUNY Retirees Service Corps (RSC) in 2010 recommended providing a mechanism for them to connect with other SUNY retirees and their campuses, having a system-wide electronic retiree newsletter, and creating a website where they can look for other retirees as well as volunteer opportunities.
- In response, the SUNY RSC is launching the **SUNY Retirees Network (SRN)**, which is composed of two phases: the **SUNY Retirees Newsletter** and a major expansion of the **SUNY Retirees Service Corps website**.
- The SUNY Retirees Newsletter, launched in November 2011, is published and electronically distributed throughout the 64-campus SUNY system by the RSC twice yearly (Spring/Summer and Fall/Winter issues). Most of the articles are written by SUNY retirees. Current and past issues are available at <http://old.suny.edu/retirees/newsletters.cfm>.
- Expansion of the SUNY Retirees Service Corps website is phase two of the SUNY Retirees Network. It is designed to connect SUNY retirees via a secure online directory, promote online interaction among retirees, and connect interested retirees with volunteer opportunities.
- The SUNY Retirees Network platform is being designed from the ground up by in-house staff.
- By using the **SUNY Retirees Online Directory**, SRN members will be able to securely look up and connect with other SUNY retirees who have registered for the Network and opted to be listed in the directory.
- The **SUNY Retirees Interaction Service** will allow retirees to securely interact in real time and exchange information with one another through a chat feature as well as explore a variety of online resources.
- The Retirees Service Corps plans to launch a **volunteer matching service** once a sufficient number of retirees who expressed interest in volunteerism during the sign-up process have registered for the SUNY Retirees Network. Information retirees provide will be used to match their interests and expertise with campus and community needs.
- Once programming is complete, at least one campus will test the SUNY Retirees Network and its various elements before the service is announced system-wide.

Developing the Retiree Legacy Scholarship, Kennesaw State University

Ellen Jones, Kennesaw State University

The Kennesaw State University (KSU) Retiree Legacy Scholarship, which is available to relatives of retired faculty and staff, has been a vehicle for KSU retirees to demonstrate their loyalty and support for their institution.

Takeaways:

- Legacy scholarships can be a meaningful way for retirees to contribute to the campus
- Scholarship details:
 - Enrolled full or part-time at KSU
 - 2.75 GPA or higher
 - Undergraduate/graduate
 - Undergraduate—sophomore, junior, senior may apply
 - Pursuing a degree in any major
 - Good academic standing and record
 - Preferred that student demonstrates financial need
 - Direct descendant or family relation to a retired faculty or staff member (10 years of KSU service)*
 - May be awarded more than once

“Graceful Exit” Videos: A Resource for Faculty Transitioning to Retirement

Joan Merdinger and Amy Strage, San José State University

Sixteen emeritus faculty members were videotaped sharing their transition experiences from the time they were fully employed to the time of their retirement. The interviews are posted on the Internet.

Takeaways:

- Preparing for retirement is a complicate process/videos were created:
 - To offer perspectives from a range of retired faculty (n = 16)
 - To meet the needs of a wide variety of faculty (faculty are like snowflakes...no two are alike)
 - To reach those who wish to be very private about their intentions to retire...
 - And to provide access to the information anywhere/anytime.
- Seven interview themes emerged:
 - Attending to your financial security your health and fitness is essential
 - Emotions are part of the experience
 - Consider easing into this transition
 - Have a plan for spending your time
 - Like the people with whom you engage
 - Don't take on too much too quickly
 - Stay intellectually engaged
- Financial literacy for faculty online video modules:
 - Introduction
 - Time Value of Money & the Power of Compounding
 - Salary & Benefits
 - The CSU Retirement Program/CalPERS
 - Supplemental Savings Program
 - Guidelines & Tips for Retirement Savings

Panel: Connecting Campus & Retirement Communities

Panelists: Brian Kaskie, University of Iowa; Sean Kelly, Kendal Corporation; Margaret Scott, Belmont Village

Panelists included two who develop and operate retirement communities and a university researcher who undertook a project to establish campus-adjacent senior housing at three campuses in the state of Iowa.

Takeaways:

Retirement living key findings:

- Campus-adjacent housing projects can be win-win for universities and retirees
- Most people plan to stay in community upon retirement
- More than half realize their home will be hard to live in
- Most people will “re-locate” locally
- Most interested in assisted living
- Many interested in senior villages
- Almost everyone values a livable community development
- 75% are willing to invest their own money

Presentation: Retiree Engagement in Volunteering

Presenters: John S. Anderson, Alan Kagan and Alexander Levitan, University of Minnesota

The University Retirees Volunteer Center (URVC) at the University of Minnesota connects volunteers with projects such as ushering at events, serving as jurors for mock trials and more.

Takeaways:

The University Retirees Volunteer Center (URVC) at the University of Minnesota focuses on

- Identification of projects that are seeking volunteers
- Identification of people who wish to volunteer and the kind of volunteer work they wish to do
- Connecting volunteers with projects
- Recording projects and volunteers hours

Our volunteer staff are continually reviewing potential projects and screening them for those that appeal to our volunteers. Each year about fifty projects are selected which benefit both the University and the surrounding community.

About two hundred people put in nearly 8,000 hours of volunteer effort last year. This was accomplished with a budget of four thousand dollars most of which was used to defray parking charges for the volunteers, recruitment, appreciation of volunteers, and office supplies.

Most volunteers recognize that they benefit as much from their volunteer effort as the projects which they support. For more information, see www.urvc.umn.edu

Session details—day two

Presentation: Best Practices for Faculty Retirement Transitions

Presenters: Sue Barnes, University of California, Davis and AROHE; Janette Brown, University of Southern California and AROHE; Susan Kress, Skidmore College; Beverly Nagel, Carleton College; Joan Merdinger and Amy Strage, San Jose State University

Winners of \$100,000 ACE/Sloan Foundation Awards for Faculty Retirement Programs shared ideas for helping senior faculty to navigate the transition, including pre-retirement planning, retirement and post-retirement.

Takeaways:

- Continuing retired faculty connections beneficial
- All phases need support
- Coordination with departments essential
- Shared planning most successful
- Best incentives: flexible, transparent, equitable
- Constant communication is key
- Retiree organizations important partners

Panel: Building Relations with Staff Retirees

Jim Clemmer and Hester Crews, Austin Peay State University; Patrick Cullinane, University of California, Berkeley; Elaine Steward, University of Southern California

This panel will offered two models to address staff needs: 1) a blended approach whereby the organization includes faculty and staff, and 2) two separate organizations, one for faculty and another for staff.

Takeaways:

- Retirement transformation:
 - A 20 to 30-yr. stage of life defined by health and function
 - Continued health & vigor for many
 - Self-reinvention
 - Focused on both old & new life options
- Top three concerns:
 - Finances
 - Life's Meaning
 - Personal Connections
- Our hope:
 - That instead of a plank off the campus ship into unknown waters...
 - We offer a bridge to an interesting and satisfying future
- The Graceful Exit:

“There’s a trick to the ‘graceful exit.’ It begins with the vision to recognize when a job, a life stage or a relationship is over – and let it go. It means leaving what’s over without denying its validity or its past importance in our lives. It involves a sense of future, a belief that every exit line is an entry, that we are moving up, rather than out.”

Author and columnist, Ellen Goodman

Presentation: Building Relationships on Campus and in the Community

Michael Stover, Osher Lifelong Learning Institute, California State University, Fullerton

The Osher Lifelong Learning Institute (OLLI) located on the campus of California State University at Fullerton is a successful model of community-based learning for older adults.

Takeaways:

- Osher Lifelong Learning Institutes (OLLIs) exist at 119 universities in the United States; their membership is comprised of retired and semi-retired individuals
- Each OLLI is independent and locally governed by lifelong learners under charters or other enabling documents from their universities
- The institutes are financially self-supporting; they receive the majority of their revenue from membership fees, Bernard Osher Foundation endowments and sustaining and planned gifts from their members and others
- The national OLLI resource center is headquartered at Northwestern University (effective Oct. 1, 2014)
- OLLI activities are complementary to emeriti organizations that co-exist on most of the 119 campuses; many emeriti hold dual memberships and serve as leaders or instructors in their campus OLLI
- OLLIs often have two purposes: organizing non-credit courses and serving as vibrant university support organizations
- The OLLI at Cal State University, Fullerton (<http://olli.fullerton.edu>) has grown to 1,550 members with 360 courses offered each year from unpaid instructors at an on-campus center whose construction costs were wholly paid for my fund raising organized by OLLI-CSUF members
- The CSUF OLLI's primary organizing principle is that lifelong learners should not be relegated to the role of passive "receivers" of information. They can be successfully empowered to be the central "actors" to organize, teach and deliver instruction to their peers

"School Forever:" The Life of the Mind in Emory University's Emeritus College

John Bugge and Gretchen Schulz, Emory University

Emory University's Emeritus College members participate in luncheon colloquia, semester-long seminars and mentoring programs. The college also supports ongoing scholarship through various other means.

Takeaways:

The foundational premises of the Emory University Emeritus College are that:

- The life of a university faculty member is first and foremost an intellectual life, a life of the mind, and retirement does not change that;
- While the intellectual life is one led in a community, not in solitude, retirement threatens faculty members' connection to that community;
- Many faculty are reluctant to retire because they fear the loss of the intellectual stimulation that was theirs as members of such an academic community;
- For these reasons, what is needed is a true *collegium*, a community of scholars who are both faculty and students at the same time.
- The mission of the Emeritus college, like many another, is to promote among its membership continued scholarship, teaching, learning, mentoring, and academic service to the University and to the community at large.

Presentation: Going Dynamic and Data-Based: Upgrading Your Website

John Casagrande, University of Southern California and David Naumann, University of Minnesota

The presenters discussed the process of building a dynamic CMS-based website, along with some of the roadblocks and sidesteps that may be encountered.

Takeaways:

- A “static website,” the usual kind, is limited in scope and size, and is almost always out-of-date
- Static website updates flow through single technical person, creating a bottleneck
- Static website does not support any transactions by its users
- Dynamic website has two added components: a “Content Management System,” (CMS) and a connected database
- CMS generates every page “on-the-fly” from dated and key-worded content that can be posted by any source or person designated by administrator/webmaster
- Database adds user security, authorized user transactions including financial ones, and management reporting
- The combination of CMS and database provides the technology needed for website to become central to all an organization’s communications and activities
- The easiest way to obtain a dynamic website is buying an external service – but that can be costly, you may need to accept limitations, and will require continuing support
- Open source software like civiCRM lowers cost greatly – but requires costly setup, customization, and support by experts
- Building your own requires technical expertise, can take a very long time, and requires long-term maintenance by experts

Workshop: Make “Plan A” Work: Managing Projects

David Ewert, Georgia State University

The presenter detailed a method for effectively managing projects, along with examples that the participants could apply to their organization’s projects.

Takeaways:

- Listening and talking with our colleagues leading retirement organizations, we get inspired and want to innovate by adopting and adapting their best practices. This session focuses on using project management to implement these practices in our own ROs.
- Projects have a well-defined end. Programs can be ongoing. Being able to make Plan "A" work enhances the camaraderie of the project team members and helps develop future leaders of the RO.
- We will need to plan and control our new projects. With 45 minutes we only covered planning, which does lay the foundation for control. The single most important step in project management is creating a project charter. Do it as a group with the key members of the project team. The charter includes concise statements of why this project, what is and is not part of the project, who will do it and when is the project finished.
- Projects should be broken down into a series of activities with accountability for each activity assigned to an individual. Verbs are often used to describe activities, e.g., get current mailing and email addresses of members, make a mock-up of newsletter, approve mock-up.
- Put activities in sequence, determine project's duration and adjust plan when needed to meet deadline.