



Association of Retirement Organizations
in Higher Education (AROHE)



Retiree Organizations in Higher Education: **VALUES** AND **OPPORTUNITIES**

4TH INTERNATIONAL CONFERENCE
OCTOBER 24-26, 2008

Radisson Hotel Los Angeles Midtown at USC

UNIVERSITY OF SOUTHERN CALIFORNIA
LOS ANGELES

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 their quality of life and that of the community and institutions through creating new models of retirement.

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

The concept of an annual conference for on-campus retirement organizations emerged after a 1984 survey of public and private universities was conducted by the University of Southern California Emeriti Center. Only a quarter of the over 100 respondents indicated that their campus had any formal group or center focusing on retired persons or their interests. James Peterson, Harriet Servis, and Arnold Small coordinated the first Conference on Retirement in California Colleges and Universities in May 1985 at USC with ten institutions represented. The newly named West Coast Conference on Retirement in Colleges and Universities continued annually at USC from 1986 to 1988 and became an international effort at the fifth conference in 1989 at the University of Washington, where twenty-two institutions from the US and Canada were represented. Efforts to expand the conference beyond the west coast stalled when the 1990 conference to be held at Purdue University was canceled due to low registration; however, a group of prior participants revived the effort eight years later, resulting in the 1998 conference held aboard the Royal Caribbean Legend of the Seas.

At the end of a conference held by North Carolina State University in 2000, a group of participants re-evaluated the program and decided to establish a formal, multi-campus association that would be dedicated to providing a forum for the discussion of all aspects of retirement in higher education. AROHE was launched with Paul Hadley of the University of Southern California as its organizing president. In 2002, AROHE held its inaugural conference in Bloomington, Indiana (Indiana University). It was at this conference that the name *Association of Retirement Organizations in Higher Education* was officially proposed and accepted. Later that year, AROHE was officially incorporated as a 501(c) (3) nonprofit organization. AROHE held subsequent conferences in Nashville, Tennessee in 2004 (Vanderbilt University); and Tempe, Arizona in 2006 (Arizona State University). In addition to publishing a newsletter and online resources, AROHE continues to host biennial conferences. Two significant accomplishments have been the development of a *Start-up Kit* to assist other institutions of higher education in forming retirement organizations. The second accomplishment is conducting a *Survey of College and University Retiree Organizations* to help members and others learn about what educational institutions are doing to support, serve, advocate for, engage, utilize, and honor their retired faculty and staff.

CONFERENCE SCHEDULE

THURSDAY, OCTOBER 23

PRE-CONFERENCE ACTIVITIES

1:30 PM–7:00 PM

Registration

Hotel Lobby, 2nd Floor

1:30 PM–2:30 PM

Optional Walking Tour to USC Emeriti Center

Hotel Lobby, 1st Floor

2:30 PM–4:30 PM

AROE Board Meeting

11th Floor, Guest Lounge

3:00 PM–4:00 PM

Optional USC Tour

Hotel Lobby, 1st Floor

5:00 PM–6:30 PM

Reception: Welcome and Networking

Galleria, 2nd Floor

9:35 AM–10:00 AM

Energy Break

Galleria, 2nd Floor

10:00 AM–11:15 AM

AROE Survey: What We Have Learned About Retiree Organizations

Janette Brown, Executive Director, AROHE; Executive Director, Emeriti Center, USC

Ken Klein, Vice President-Membership, AROHE; Professor Emeritus, Valparaiso University

Linda Pearson, Secretary, Conference Program Chair, Research Committee, AROHE; Adjunct Faculty, Ivy Tech Community College

11:15 AM–11:40 AM

Open Forum: Issues and Answers

Moderator: **Helen Dennis**, Specialist on Aging, Employment and Retirement; Author, "Project Renewment"; Lecturer; Columnist, *Daily Breeze*

11:40 AM–11:55 AM

Latest Research at the USC Davis School of Gerontology

Gerald Davison, Dean, USC Davis School of Gerontology; Executive Director, Ethel Percy Andrus Gerontology Center

12:00 PM–1:15 PM

Luncheon

West Wing, 2nd Floor

Featured Speaker: **Jack Rothman**, Comedian; Professor Emeritus, UCLA

FRIDAY, OCTOBER 24

7:00 AM–8:00 AM

Continental Breakfast with Networking Tables

(see networking options at end of program)

Galleria and Grand Ballroom, 2nd Floor

7:30 AM–10:30 AM

Registration Open

Hotel Lobby, 2nd Floor

Exhibits open throughout the conference

Galleria, 2nd Floor

MORNING FOCUS:

UNITING EXPERIENCE AND LATEST RESEARCH

All morning programs in the Grand Ballroom, 2nd Floor

8:00 AM–8:20 AM

Conference Opening

AROE Welcome and Board Introductions

Conference Co-Chairs: **Janette Brown**, Executive Director, AROHE; Executive Director, Emeriti Center, USC

Eddie Murphy, Newsletter Editor, AROHE; Director Emeriti/Retirees Relations Center, UCLA

8:20 AM–8:30 AM

USC Welcome: Celebrating Thirty Years

Todd Dickey, Senior Vice President, University of Southern California (USC)

8:30 AM–9:35 AM

Paul Hadley Honorary Address:

The Retirement Revolution—A Winning Opportunity

Helen Dennis, Specialist on Aging, Employment and Retirement; Author, "Project Renewment"; Lecturer; Columnist, *Daily Breeze*

AFTERNOON FOCUS:

OPERATING EFFECTIVE RETIREE ORGANIZATIONS

1:30 PM–3:00 PM

PANEL: From Alive to Thrive

Grand Ballroom, 2nd Floor

Moderator: **Eugene Bianchi**, Past President, AROHE; Professor and Director Emeritus, Emory University Emeritus College

- ***We Need You! Models for Satisfying Retirees' Needs and Protecting Benefits***

John Meyer, Past President, Windsor University Retirees' Association, University of Windsor; Vice-President, College and University Retiree Associations of Canada (CURAC)

- ***The Importance of Synergy Between Retirement Organizations and the Administration***

James Saunders, Professor Emeritus, President, Association of Senior and Emeritus Faculty, University of Pennsylvania School of Medicine

- ***Refocusing a Retired Faculty Association***

Bobbie Lubker, Professor Emerita; President, Retired Faculty Association, University of North Carolina at Chapel Hill

3:00 PM–3:15 PM

Energy Break

Galleria, 2nd Floor

3:15 PM–4:15 PM

CONCURRENT SESSIONS—SELECT FROM THE FOLLOWING:

OPTION 1

Starting a Retiree Organization

Grand Ballroom, 2nd Floor

- **Case Study of a Start-Up**
Karl Scheibe, Director, Susan B. and William K. Wasch Center for Retired Faculty, Wesleyan University
Bill Wasch, Advisory Board, Susan B. and William K. Wasch Center for Retired Faculty, Wesleyan University
- **AROHE Start-Up Kit**
Tom Elleman, Treasurer, AROHE; Professor Emeritus, Association of Retired Faculty, North Carolina State University

OPTION 2

PANEL: Promoting and Marketing Your Retiree Organization

West Wing, 2nd Floor

Moderator: Sue Luckey, Vice President, Programs, AROHE; MSU Retirees Association, Morehead State University

- **Showcasing Retiree Accomplishments**
Lucy Rollin, Professor Emerita; Chair, Emeritus College Advisory Board, Clemson University
- **Using a Web Site to Promote a Retiree Organization**
Robert Fuller, President, UNL Emeriti Association, University of Nebraska, Lincoln
- **Creating and Implementing a Comprehensive Marketing Strategy**
Andre Porter, Senior Administrative Analyst, UC Berkeley Retirement Center

4:15 PM–5:15 PM

CONCURRENT SESSIONS—SELECT FROM THE FOLLOWING:

OPTION 1

PANEL: A Discussion with Retiree Organization Directors

Grand Ballroom, 2nd Floor

Moderator: Betty Redmon, Former Executive Director, AROHE; Director Emerita, Emeriti Center, USC

- **Pat Dougherty**, Executive Director, University of Washington Retirement Association (UWRA)
- **Jeri Frederick**, Director, UCI Retirement Center, University of California, Irvine
- **Cathie Logan**, Director, WSU Retiree Center, Winona State University
- **Eddie Murphy**, Newsletter Editor, AROHE; Director Emeriti/Retirees Relations Center, UCLA

OPTION 2

Special Demonstrations, Resource Tables, and Exhibits

Galleria, 2nd Floor

- **Technology Made Simple for Retirees**
(will repeat again Saturday from 4:15 PM -5:00 PM)
Michelle Man, Department of Occupational Science and Occupational Therapy, USC
- **Retiree Computer Help Squad and Retiree Organization Web Sites**
Bob Stallings, Web Master, Emeriti Center, Retired Faculty Association, and Staff Retirement Association, USC

4:30 PM

Optional Walking Tour to USC Emeriti Center

Hotel Lobby, 1st Floor

6:00 PM

Optional Dining Around LA

Sign Up sheet at Registration Table

SATURDAY, OCTOBER 25

7:00 AM–8:00 AM

Continental Breakfast with Networking Tables

(see networking options at end of program)

Galleria and Grand Ballroom, 2nd Floor

7:30 AM–10:30 AM

Registration Open

Hotel Lobby, 2nd Floor

MORNING FOCUS:

LEARNING, WORK, AND SERVICE

All morning programs in the Grand Ballroom, 2nd Floor

8:00 AM–8:20 AM

Trends in Lifelong Learning and Higher Education as They Affect Retiree Organizations

Linda Pearson, Secretary, Conference Program Chair, Research Committee, AROHE; Adjunct Faculty, Ivy Tech Community College

8:20 AM–9:00 AM

PANEL: Campus Retiree Re-employment Programs

Moderator: Barry Culhane, Executive Assistant to the President, Rochester Institute of Technology

- **Retiree Work Opportunities Program, UC Berkeley**
Andre Porter, Senior Administrative Analyst, UC Berkeley Retirement Center
- **Trojan ENCORE Work Opportunities Pilot Program, USC**
Janette Brown, Executive Director, AROHE; Executive Director, Emeriti Center, USC
Carole Gustin, President, USC Staff Retirement Association; Coordinator, Trojan ENCORE, USC

9:00 AM–10:00 AM

PANEL: Educational and Creative Programs

Moderator: Len Gordon, Retired Dean, College of Liberal Arts and Sciences, Sociology, Arizona State University

- **The Emeriti College Approach**
Jerry Walker, Director, Emeriti College, USC
- **Retirement Transition Programming**
Pat Dougherty, Executive Director, University of Washington Retirement Association (UWRA)
- **A Collaboration: Developing a Learning Experience for Retirees**
Barton Boyle, President and Program Chair, MU Retirees Association, University of Missouri

10:00 AM–10:15 AM

Energy Break

Galleria, 2nd Floor

10:15 AM–11:25 AM

PANEL: Serving Campus and Community

Moderator: Cathie Logan, Director, WSU Retiree Center, Winona State University

- **Managing a Successful Volunteer Program**
Suzan Cioffi, Director, Retirement Resource Center, University of California, San Diego
- **An Emeriti Mentoring Program**
Jack Fisher, Chair Emeritus, Emeriti Mentoring Program, University of California, San Diego

- **Oral and Living History Projects: Exploring Emeriti Lives**
Dick Stryker, Professor Emeritus; Director IU Emeriti House, Indiana University, Bloomington
Donald Gray, Chair Emeritus, Executive Committee, Emeriti House, Indiana University, Bloomington
John Woodcock, Associate Professor Emeritus, Emeriti House, Indiana University, Bloomington

11:30 AM

Walk (or transport) to USC Town and Gown for Luncheon

Hotel Lobby, 1st Floor

11:45 AM–1:15 PM

USC Emeriti Center 30th Anniversary Reception and Luncheon

USC Town and Gown

*Speaker: Roger Annusen, Creator of MemAerobics
 Sponsored by AARP-NRTA Keeping Sharp Program*

1:15PM–1:30 PM

Return to hotel for afternoon sessions

AFTERNOON FOCUS: HOUSING, BRAIN HEALTH, AUTOBIOGRAPHY, AND RESOURCES

1:45 PM–3:15 PM

PANEL: University Affiliated Retirement Housing
Grand Ballroom, 2nd Floor

Moderator: Eddie Murphy, Newsletter Editor, AROHE; Director Emeriti/Retirees Relations Center, UCLA
Patricia Will, President, American Senior Housing Association, CEO – Belmont Village Senior Living
Frank Rees, President, Rees Associates
Richard M. Mazza, Vice President, Business Development and Planning, Pacific Retirement Services
Adrian Harris, Vice Chancellor Emeritus, UCLA

3:15 PM–3:30 PM

Energy Break

Galleria, 2nd Floor

3:30 PM–4:15 PM AND 4:15 PM–5:00 PM

CONCURRENT SESSIONS—EACH REPEATS A SECOND TIME:

OPTION 1

Brain Health Ambassadors Program

Grand Ballroom, 2nd Floor

Roger Annusen, Creator of MemAerobics

OPTION 2

Autobiography Program for Retirees

West Wing, 2nd Floor

James Birren, Founding Dean, USC Leonard Davis School of Gerontology, former Associate Director, UCLA Center on Aging, a founder of the field of Gerontology
Cheryl Svensson, Lecturer, California State University, Fullerton, and USC

OPTION 3

Galleria Exhibit Hall and Resource Tables

- **Technology Made Simple for Retirees (4:15 PM only)**
Michelle Man, Department of Occupational Science and Occupational Therapy, USC

5:30 PM

Optional Evening Events

See www.arohe.org for information or visit registration desk

Vince Gill at Disney Concert Hall and dinner on your own (requires concert ticket – limited ticket availability)

Getty Center Los Angeles and dinner on your own (requires bus ticket)

SUNDAY, OCTOBER 26

7:00 AM–8:00 AM

Continental Breakfast

Galleria, 2nd Floor

MORNING FOCUS:

APPLYING WHAT WE HAVE LEARNED

All morning programs in the Grand Ballroom, 2nd Floor

8:00 AM–8:45 AM

AROHE Biennial Members Meeting (All Welcome)

8:45 AM–8:55 AM

Update: College and University Retiree Associations of Canada (CURAC)

Howard Fink, Past President, CURAC; Distinguished Professor Emeritus, Concordia University Pensioners Association, Concordia University

9:00 AM–10:30 AM

PANEL AND OPEN FORUM: Examining and Implementing Conference Ideas

*Moderators: Janette Brown, Eddie Murphy, Linda Pearson
 Panelists: Gene Bianchi, Barry Culhane, Tarun Ghose, Len Gordon, Cathie Logan, Sue Luckey*

11:00AM–12:00 PM

AROHE Board Meeting and Debriefing

CONFERENCE CONCLUDES

NETWORKING TABLES

Friday and Saturday: 7:00 AM–8:00 AM

Grand Ballroom, 2nd Floor

Directors and Leaders

Cathie Logan, Director, WSU Retiree Center, Winona State University; **Jeri Frederick**, Director, UCI Retirement Center, University of California, Irvine

Education and Creative Programs

Len Gordon, Professor Emeritus, Dean, ASU Emeritus College, Arizona State University; **Jerry Walker**, Retired Associate Provost; Director, Emeriti College, USC; **Bob Scales**, Dean Emeritus; Past Director, Emeriti College, USC

Multi-Institution Retiree Organizations

Tarun Ghose, President CURAC (College and University Retiree Associations of Canada); **Marian Gade**, Chair, Council of University of California Retiree Associations (CUCRA), University of California, Berkeley

Retired Faculty

Gene Bianchi, Past President, AROHE; Professor and Director Emeritus, Emory University Emeritus College; **Bill Wasch**, Advisory Board, Susan B. and William K. Wasch Center for Retired Faculty, Wesleyan University

Retired Staff

Dorothy Webster, President, UCLA Retirees Association
Carole Gustin, President, USC Staff Retirement Association

Start-Up Organizations

Tom Elleman, Retired Associate Dean, AROHE Treasurer, NCSU Retired Faculty Association, North Carolina State University



AROHE THANKS THESE GENEROUS CONFERENCE SPONSORS

Belmont Village Senior Living	Posit Science
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WITH SPECIAL THANKS TO:

Laura Castro and Kat Fabello, Radisson Hotel
C. L. Max Nikias, Executive Vice President and Provost, USC
Dane Martens, USC Spectrum Design Studio, USC
Dan Stimmler, Associate Senior Vice President, USC
Chris Curry, Judy Diaz, Maricela Hinojosa, Gloria Reyes, Geri Toscano, Mitzi Tsujimoto, USC Emeriti Center
USC Staff Retirement Association Volunteers
USC Retired Faculty Association Volunteers

AROHE CONFERENCE COMMITTEE:

Janette Brown and Eddie Murphy (Co-Chairs), Tom Elleman (Treasurer), Ken Kline (Conference, Membership, and Survey Recruiting), Sue Luckey (AROHE Board Elections), Linda Pearson (Program Chair and Research), Bob Stallings (Web Master)

AROHE INSTITUTION MEMBERS: PAST AND PRESENT

AARP	Missouri University	University of Kentucky
Arizona State University	Montana State University	University of Louisville
Boise State University	Morehead State University	University of Maryland
Bucknell University	North Carolina State University	University of Massachusetts Dartmouth
California State University, Northridge	Northern Illinois University	University of Michigan
Central Michigan University	Northwestern University of Medicine	University of Michigan-Dearborn
Clemson University	Oklahoma State University	University of Minnesota
Colorado State University	Oregon State University	University of Mississippi
Columbia University	Perkins & Will	University of Missouri-Columbia
CURAC College & University Retiree Association of Canada	Portland State University	University of Nebraska-Lincoln
East Carolina University	Rees Associates, Inc.	University of New Mexico
East Tennessee State University	Rochester Institute of Technology	University of North Carolina Asheville
Emory University	Rutgers, The State University of New Jersey	University of North Carolina Chapel Hill
Florida A & M University	San Diego State University	University of Pennsylvania
Florida International University	Southern Illinois University	University of Pennsylvania School of Medicine
Florida State University	Stanford University	University of Redlands
George Washington University	State University of New York (SUNY)	University of South Florida
Georgetown University	TIAA-CREF	University of Southern California
Georgia Institute of Technology	Tulane University	University of Tennessee, Knoxville
Georgia State University	UCLA	University of the Pacific
Harvard University	University of Alabama	University of Toronto
Indiana State University	University of Arkansas	University of Washington
Indiana University	University of California Santa Barbara	University of Wisconsin Green Bay
Indiana University-Purdue University Indianapolis	University of California, Berkeley	Valparaiso University
International Association of Universities	University of California, Davis	Vanderbilt University
Iowa State University	University of California, Irvine	Washington State University
James Madison University	University of California, San Diego	Wesleyan University
Johns Hopkins University	University of Delaware	Williams College
Johnson City Community College	University of Denver	Winona State University
Lawrence Berkeley National Laboratory	University of Hartford	Winthrop University
Marymount College Fordham University	University of Hawaii	Wright State University
Massachusetts Institute of Technology (MIT)	University of Hawaii Manoa	Yale University
Michigan State University	University of Indianapolis	
	University of Iowa	
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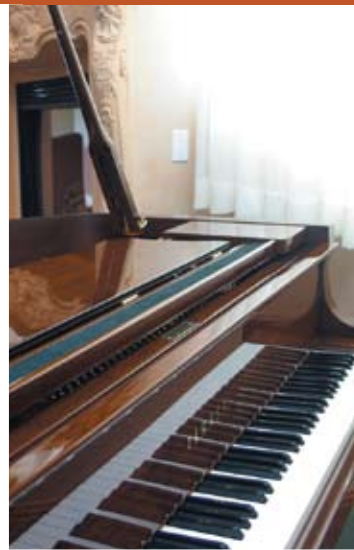
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— Mitzi Tsujimoto,
resident at The Fair Oaks
and Associate Director, USC Emeriti Center



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