

# The Next Chapter

Association of Retirement  
Organizations in Higher  
Education (AROHE)

DECEMBER 2006

Happy Holidays!



## In this Issue ...

✦ Executive Director's Report

✦ Organizing the Past



Spotlight on ...

...Arizona State University  
Emeritus College

✦ AROHE Conference Summary

## FROM THE EXECUTIVE DIRECTOR

The third biennial AROHE Conference was a great success this fall thanks to our new AROHE President, Shelley Glazer, who served as the Conference Chair and had a major role in organizing the conference. Dick Jacob our ASU host and his assistant, Maureen Graff are to be thanked for their tireless efforts as well. With the participant evaluations and suggestions we will continue to improve our future conferences and provide more value for all AROHE members.

It was such a pleasure to meet so many of you at the conference and I am excited to move ahead with our number one goal: to provide VALUE to our members that can help each organization achieve its goals.

How can AROHE provide value to your organization?

AROHE has great contributions in two formal publications: *Continuing the Connection: Emeriti/Retiree Centers On Campus* published in Educational Gerontology in May 2005 [http://www.arohe.org/Continuing\\_Connection.pdf](http://www.arohe.org/Continuing_Connection.pdf) and the *AROHE Start-Up and Development Kit* that we distributed to all Conference attendees in October. It is also available by e-mail along with the "how to" attachments from the AROHE office.

We can also provide value by sharing best practices and networking with similar organizations that can provide ideas and advice as we grow and evolve according to our unique organizational needs.

We are joining together with Tom Elleman, Ken Klein, and others to create a survey that should provide a better picture of how retirement organizations are configured and

funded, what services they provide, and best practices. This should give you the opportunity to network with colleagues in similar situations and share ideas. Please send us your thoughts and ideas!

We are so grateful for the dedication and hard work of our 2005-2006 board members who served us well:

### **THANK YOU!**

Eugene Bianchi, President  
Emory University  
Shelley Glazer, First Vice President  
University of California, Berkeley  
Judith Blucker, Second Vice President  
Florida International University  
Linda Pearson, Secretary  
University of Indianapolis  
Norma Summersgill, Treasurer  
San Diego State University  
Paul E. Hadley, Founding & Past President  
University of Southern California  
Barry Culhane  
Rochester Institute of Technology  
Thomas Elleman  
North Carolina State University  
Ralph Garber  
University of Toronto  
Robert Henrikson  
Oklahoma State University  
Richard J. Jacob  
Arizona State University  
Kenneth Klein  
Valparaiso University  
Sue Luckey  
Morehead State University  
Bernard Lytton  
Yale University  
Eddie Murphy  
University of California, Los Angeles  
Peter Russell  
College & University Retiree  
Associations of Canada  
Marilyn Shopper  
Johnson City Community College  
Anita West  
University of Denver

### **2006-2007 AROHE BOARD WELCOME**

Janette Brown, Executive Director  
University of Southern California  
Shelley Glazer, President  
University of California, Berkeley  
Kenneth Klein, VP for Membership  
Valparaiso University  
Sue Luckey, VP for Programs  
Morehead State University  
Tom Elleman, Treasurer  
North Carolina State University  
Linda Pearson, Secretary  
University of Indianapolis  
Eddie Murphy, Newsletter Editor  
University of California, Los Angeles  
Eugene Bianchi, Past President  
Emory University  
Paul E. Hadley, Founding President  
University of Southern California  
Barry Culhane  
Rochester Institute of Technology  
Howard Fink  
College & University Retiree  
Associations of Canada  
Richard Jacob  
Arizona State University  
Bobbie Lubker  
University of North Carolina  
Nancy O'Hare  
James Madison University  
Karl Scheibe  
Wesleyan University  
Marilyn Shopper  
Johnson City Community College  
Doreen Barcellona-Strnad  
University of California, Davis  
Robert Swenson  
Montana State University  
Robert Zimdahl  
Colorado State University

We are looking for a great location for our next AROHE Conference! Is your university willing to host us? If so, please contact us!

Best,

*Janette C. Brown, Ed.D.*



## ORGANIZING THE PAST

### “Creating an Archiving System for a Retiree Organization”

**When any new** organization is being formed, it may fairly safely be supposed that one consideration far from its planners’ minds is the need to set up and maintain a file to document its history. Still, within a surprisingly short time, as the original officers are replaced, structures are refined, and memories fade, questions arise which can only be answered by recourse to letters, minutes of meetings, committee reports or financial records prepared by predecessors. Just how firmly were commitments made to a given course of action, precisely when, and by whom with what authority? What was the thinking behind the creation of a certain committee, and was it intended to be standing or only ad hoc? What actual wording was engraved on an award of appreciation now to be repeated for another recipient, and how much did it cost? By how much has constituent support increased since a newsletter was instituted? A thousand such questions, broad or detailed, present themselves unexpectedly, and to respond adequately reliable records are needed which will not be available unless all potentially relevant papers have been set aside from the beginning.

**Eddie Murphy, who is** the director of UCLA’s Emeriti/Retirees Relations Center, has asked me as an archivist for the UCLA Emeriti Association to describe in general terms our experience in developing an archive for our

particular Association, as it seemed to her that this might be of interest to similar groups considering setting up archival files of their own. In agreeing to attempt this, however, I must first make absolutely clear that what I can write is in no way prescriptive: every organization has its unique structure and procedures, and its archive must appropriately reflect these. At most, I am offering an example of how one single association is meeting its individual requirements.

**The UCLA** Emeriti Association was formed in the course of the academic year 1967/68 by a small group of emeriti who believed that the interests of retired faculty were, and would continue to be, in need of advocacy within the University community. Their first months were spent in preparing a Constitution and Bylaws which provided definition and structure for their new organization and brought quick and enthusiastic recognition by the campus administration. No immediate thought was given to developing an archive as such, but some happy instinct impelled many of the early Association officers to leave their papers with the then-director of the new Emeriti Center (established by the UCLA administration in response to emeriti representations of need for support of various kinds)—and, as time went on, these papers were shuffled in no order into boxes gradually relegated to the director’s garage. It took well over two decades and the retirement of that long-serving Center Director before the Emeriti Association’s Executive Board finally focused on the matter of archival records, had the waiting boxes retrieved and appointed two retired librarians to arrange their contents as the nucleus of a genuine archive. It will be seen that our Association benefited doubly by quite fortuitous good luck in this shambling history: elapsed time has allowed the Association to settle into a stable operational pattern which could be reflected in an archival arrangement, and a substantial body of documentation had

accrued which could straightway flesh out the emerging conceptual scheme. As the work of sorting progressed, it was of course possible to identify where coverage was thin and in some cases to augment holdings by obtaining missing items from emeriti still holding them. Through the years that have followed an active program of collection has slowly expanded the archive to fill its present nine standard file-cabinet drawers.

**An initial realization** in working with the materials on hand was that our Emeriti Association archive needed to be divided into two basic sections, the first consisting of records concerning individual emeriti, and the second comprised of records of the Association itself. In Section I, records of any sort concerning individuals eligible for membership in the Association (bibliographies, newspaper or magazine articles, press releases, ephemeral publications, photographs, audio- and videotapes etc.) are collected and filed by each individual's name in a single alphabetical sequence. Upon the death of an emeritus, all materials on hand concerning that individual are withdrawn from the file for the transmission to the main University Archives, where they are consolidated with any other materials which may already be deposited there. Also, at the request of the UCLA Academic Senate office, packets of accumulated information are in most cases prepared to assist in the writing of official "In Memoriam" statements.

**It was for** section II, the records of the Association itself, that the real decisions as to a logical pattern of arrangements needed to be made—as would certainly be the case with predictably differing results for other organizations. At UCLA the Emeriti Association has since its beginning had comprehensive Bylaws, detailing its structure of officers and standing committees, and for the monthly meeting of its Executive Board the agendas have long followed a standard

pattern of reports from officers and committee chairs which to a great extent parallels the Bylaws. It seemed sensible, therefore, to develop an arrangement scheme which would loosely correspond, especially as this would seem familiar to archive users and facilitate consultation. We began, accordingly, with General Papers (including General History, Constitution and Bylaws, listings of officers and Committee Members, and Minutes of the Executive Board), and proceeded to Papers of Officers (Presidential Papers, Corresponding Secretary's records, and Treasurer's financial records), Papers of Standing Committees (arranged alphabetically by committee), Papers representing Ongoing Liaisons with other UC entities (such as the UCLA Faculty Centers, the Council of University of California Emeriti Associations, etc.), Papers of Ad Hoc Committees, and finally a file of the Association's Newsletter. In certain cases where a particular document seems appropriate to more than one file, duplicate copies are included. Folders for each general category as well as the documents within them are arranged in reverse chronological order. Each broad category is assigned a different color of file folder to demarcate main divisions. A "Guide to the UCLA Emeriti Association Archives," updated regularly to accommodate changes and additions, has been prepared, with detailed "scope notes" defining each heading. Any reader who feels that a copy of the most recent version of this "Guide" would be of practical help is most welcome to request one by e-mailing: [emurphy@errc.ucla.edu](mailto:emurphy@errc.ucla.edu) ).

**It may seem** surprising in today's world that the UCLA Emeriti Association should be satisfied with a paper rather than a digital archive. We can only say that for us paper retains many advantages. We began with a quarter-century's accrual of paper materials and have been able easily to incorporate into it the various paper donations we continue to receive from emeriti members. While we can print out into paper format new items which

come to us via computer, the necessity to convert corresponding paper ones to digital format and to code their content to relate it to a digital file would be for us an onerous proposition. Furthermore, the quickly changing nature of digital technology which makes even today's latest equipment and operating systems obsolescent—to say nothing of our own amateur computer skills—does not encourage us to move in the digital direction. At the same time, the character of the queries our archive is asked to deal with tend to be excellently suited to the paper format: either it is a matter of retrieving a specific fact, or what is wanted is a simultaneous comparison of documents from several sources at once. Finally, our nine drawers of paper records are blessedly never subject to “down time.” In future years our successors may well have more venturesome ideas (as may—and should—our counterparts elsewhere), but for now we find ourselves happy enough with our old-fashioned paper.

*Norah E. Jones, Archivist  
UCLA Emeriti Association*



### **SPOTLIGHT ON THE EMERITUS COLLEGE AT ASU**

**The genesis** of the Emeritus College at Arizona State University was a Spring, 2003 article in the Chronicle of Higher Education, describing the Emeritus College at Emory University, which inspired Richard J. Jacob, Professor Emeritus of Physics, to suggest a similar organization to new ASU President Michael Crow. Crow responded positively to the suggestion and gave the matter over to University Provost and Executive Vice President Milton Glick (now President at University of Nevada, Reno) .

**Two retirement organizations** already existed at ASU: the ASU Retirees Association

represented faculty and staff, the latter being the predominant membership faction, and addressed social issues as well as retirement benefits, medical coverage and other political concerns; the ASU Faculty Emeriti Association was a luncheon group that also sponsored a graduate fellowship program. Jacob's concept was an organization of emeritus faculty that would give a home and a focus to continued intellectual, creative and social engagement of retired faculty with the University, a mission that neither of the other two pursued. After preliminary discussions with the leadership of the Faculty Emeriti Association, which the Emeritus College was and is not designed to supplant, a proposal to establish a Steering Committee was submitted to Provost Glick. The Steering Committee was appointed from among noted retired ASU faculty with Jacob as its Chair in September, 2003.

**Ten months'** strenuous effort by the Committee, incorporating detailed surveys of existing ASU emeriti and emeritae, examinations of similar organizations throughout the nation and, indeed, the world, professional analysis of survey results by the University's institutional studies office and perpetual refinements of the overall concept and details of structure, program and budget led to the submission of the “Proposal for an Emeritus College at Arizona State University” to Glick on Tuesday, July 6, 2004. The proposal was accepted virtually without amendment by the University administration and Jacob was appointed Dean of the Emeritus College on November 2, 2004. Also on that date, the members of the Steering Committee were appointed as members of the Emeritus College (EC) Council. The Proposal and other relevant documents are available on the College web site: <http://www.asu.edu/provost/emeruscollege/>.

**It has taken** almost two years to implement fully the provisions of the Proposal, but progress was initiated immediately and has

been sustained with unstinting university support throughout that time. Specific activities and accomplishments are detailed in the July, 2005 report (on the web site) and the subsequent issues of The Emeritus Press, the College newsletter (also available online).

A summary of the status of the College at this writing:

1. Membership of 270
2. Office Quarters in the Emeritus College Center consisting of 1600 ft<sup>2</sup> of offices, studies, conference room and utility space
3. One full-time Administrative Assistant and a full-time Secretary/ Receptionist shared with a faculty governance organization
4. Full operational support from the Provost's local funds
5. ASU Foundation Endowment and Dean's Investment accounts
6. Official status as a unit under the Provost's office with signature authority by the Dean on grant proposals and other initiatives
7. An Emeritus College Research and Creativity Grants and Awards program
8. An electronic press which publishes the newsletter and other documents
9. Personal growth classes and workshops for members
10. Service to the university and community opportunities
11. Complete organization including the College Council and an Associate Dean.
12. An external Dean's Council, consisting of noted individuals from the community
13. An endowment development campaign is in the process of being launched into the community.

*Richard J. Jacob  
Dean, Emeritus College  
Arizona State University*

## **AROHE CONFERENCE**

"Building on Experience for an Innovative Future"

Arizona State University  
October 13-15, 2006

*Impressions by Tom Elleman, North Carolina State University*

**My wife Ann** and I attended the AROHE conference in Tempe, Arizona and felt it was a successful conference. There were approximately fifty universities represented with over one hundred participants. The fifty retiree organizations were in various stages of development. Retiree groups ranged from new-starts to mature programs that were well integrated into their university and supported by paid full-time or part-time people. There even was one university president present – I think this was a first. The prevailing benefit for me in attending the conference was to learn what other programs exist, where they are going and what they are doing. This conference also provided a chance for us to network. This happened in a personal way for me. Bobbie Lubker, the new president of the retiree organization at University of North Carolina, Chapel Hill, attended the conference and she and I discussed the possibility of our two groups collaborating on some programs. Following is a sampling of some of the conference content and things I learned and observed:

**Many retiree groups** are involved in promoting artistic and musical endeavors. They hold art exhibits of work by members, host concerts and generally promote artistic activities.

**During the conference**, one discussion divided all of us according to whether we belonged to a program based on a University unit model (Emeriti/Retirees Center), an Association model or a New Start-Up group. To my surprise, there were more in the University model. Along with the big

California schools, others included in this model were Montana State, Wisconsin at Green Bay, University of Minnesota, Winthrop University and Winona State, also in Minnesota.

**We learned** that there are more schools building university-related residential retirement centers on or near campus.

**It has long been recognized** that the success of a retiree organization is largely controlled by the interest and support of their institutional leadership. This was demonstrated in the case of Arizona State University. Three years ago, their new hard-charging President (Michael Crow) put some muscle and money behind creating a campus organization. In a little over two years, they have grown to the same membership we have accumulated in twenty-four years of existence!

**When one looks** at how the successful programs like the University of Southern California, UCLA and U.C. Berkeley developed their Emeriti Centers, I can see a common pattern. The university administration recognizes they need to do something to provide a formal liaison with retirees so they hire a person. In some cases, the person is hired for a fixed or trial period to see if it works. This was the case at U.C. Irvine, University of South Carolina and Winona State located in the south east corner of Minnesota.

**A common concern** emerged for retirees at the meeting – health care. Some schools are currently undergoing major disruption in health care coverage for faculty and staff retirees and we learned that some schools do not offer continued medical coverage in retirement. I am lucky that we have a well-funded state program in North Carolina.

Following are some points we learned:

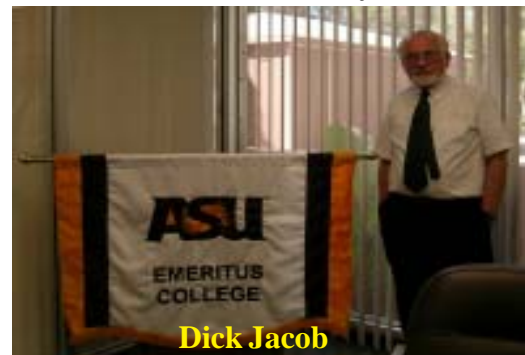
- A number of schools are now experimenting with phased retirement programs.

- Some attendees mentioned that their alumni office calls on them when alums return to the campus as alums want to see the professors that they remember, not the current faculty they don't know or remember. It was also mentioned that many retiree organizations work very closely with campus alumni organizations in other collaborative ways. Some actually are housed in or use alumni office space.
- Some representatives reported that they are obtaining oral histories from distinguished retired faculty before the opportunity disappears.
- Other retiree groups have been successful in running a volunteer organization that benefits the University.

#### CONFERENCE SNAPSHOTS



Janette Brown & Shelley Glazer



Dick Jacob



Cathie Logan, Winona State University

Association of Retirement Organizations in Higher Education  
**Annual Membership Application for 2007 (Calendar year)**

**Member Organization** (A college, university, or retirement organization in higher education). *Membership is conferred to a single organization or institution. Register up to three representatives. Multiple organizations at a single institution may join together or individually.*

**Multi-institution:**

System-wide

\_\_\_ State-wide \_\_\_ Other (please describe) \_\_\_\_\_

**Single institution:**

\_\_\_ Retirement unit or center \_\_\_ Retirement association(s): \_\_\_ Retirement organization in process of forming

\_\_\_ Administrative unit charged with retiree relations \_\_\_ No organized retiree office or group

\_\_\_ Other (please describe): \_\_\_\_\_

\_\_\_ **Faculty** \_\_\_ **Staff** \_\_\_ **Combined**

**Institution** \_\_\_\_\_ **Retirement Organization(s)** \_\_\_\_\_

(1) Voting Representative \_\_\_\_\_ E-mail \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/Prov. \_\_\_\_\_ Country \_\_\_\_\_ ZIP \_\_\_\_\_

Phone \_\_\_\_\_ Fax \_\_\_\_\_

**Additional Representatives**

(2) \_\_\_\_\_ E-mail \_\_\_\_\_ (3) \_\_\_\_\_ E-mail \_\_\_\_\_

Organization/Institution Website: \_\_\_\_\_ Permission to link from AROHE site

*(Permission is granted to organization or institution to link to AROHE website.)*

\_\_\_ Annual budget \$0 to \$49,999—AROHE Annual Dues \$100

\_\_\_ Annual budget \$50,000-\$99,999 —AROHE Annual Dues \$250

\_\_\_ Annual budget \$100,000 or more ---AROHE Annual Dues \$400

**For each individual beyond 3, add \$50 and list on separate page.**

\*\*\*\*\*

**Affiliate Member** (An individual, group, agency, or company not eligible for membership above)

Name \_\_\_\_\_ Company/Agency: \_\_\_\_\_

Address \_\_\_\_\_ City \_\_\_\_\_ State/Prov. \_\_\_\_\_ ZIP \_\_\_\_\_ Phone \_\_\_\_\_ Fax \_\_\_\_\_

\_\_\_ Individual (non-commercial, non-agency) —\$100 Annual Dues

\_\_\_ Nonprofit individual, group or agency—\$400 Annual Dues

\_\_\_ Commercial individual, group or agency—\$500 Annual Dues

\*\*\*\*\*

*For Information: [www.arohe.org](http://www.arohe.org), [arohe@usc.edu](mailto:arohe@usc.edu), (213) 740-7121. Make checks (US Dollars) payable to: Association of Retirement Organizations in Higher Education (EIN: 91-2157286) Mail to: AROHE, 3715 McClintock Avenue, Suite 220, Los Angeles, CA 90089-0191*

**AROHE**  
 3715 McClintock Avenue, Suite 220  
 Los Angeles, CA 90089-0791