

The Next Chapter

Association of Retirement
Organizations in Higher
Education (AROHE)

DECEMBER 2007



In this Issue ...

 **Executive Director's Report**

 **Spotlight on ...**

...Clemson University

Emeritus College

 **AROHE Conference 2008
Call for Presentations**

 **And More...**

FROM THE EXECUTIVE DIRECTOR

What do educational institutions do to support, serve, advocate for, engage, employ, and honor retired faculty and staff?

Take the AROHE Survey of COLLEGE and UNIVERSITY Retiree Organizations and find out!

We will present results at the October 24–26, 2008 AROHE Conference

AROHE has such tremendous potential to provide value for our members!

The newest and most important way to provide value is to obtain a large survey response from the AROHE Survey. What we learn from the **AROHE Survey of COLLEGE and UNIVERSITY Retiree Organizations** will inform and benefit AROHE members. This will be one of our most valuable member resources and help us to become a powerful advocate and resource for retired faculty and staff.

So far, we have 40 survey respondents and we are beginning to collect good data about: sources of support, number of retirees served, and types of retiree organization sponsored activities just to name a few.

I encourage each and every one of you to contact colleagues near and far. Please remind them to take the AROHE survey on our website. www.arohe.org

NOTE: By completing the survey, respondents are automatically entered into a drawing for a 1-year free AROHE membership!

Thirty separate institutions have responded to our survey. Several of those institutions had more than one campus retiree organization respond to the survey. We appreciate and commend those early participants. It shows their commitment to informing the field.

Sneak Preview!

(Remember, this is just initial data from only a small sample)

Results from the organizations that have responded so far:

82% are single institutions
18% represent multiple organizations
42% are public institutions
37% represent private ones
55% note that they are in urban locations
71% have office space within a campus building
86% receive secretarial, postage, copying services support

Sources of funding

61% have Provost's or Chancellor's Office funding
42% collect dues
30% receive support from fund raising
12% have endowments

Populations served by the retiree organizations:

54% Faculty only
37% Faculty and Staff
6% Staff only
60% include spouses/partners/widows of retirees

Responding institutions:

Arizona State University
Clemson University
Colorado State University
East Tennessee State University
Emory University
Georgetown University
Georgia State University
Montana State University
Morehead State University
North Carolina State University
Northwestern University
Oklahoma State University
Retirement Assoc. of Portland State (RAPS)
Rochester Institute of Technology
University of California, Davis
University of California, Irvine
University of California, Los Angeles
University of California, San Diego
University of California, Santa Barbara
University of Denver
University of Iowa
University of Pennsylvania

University of Redlands
University of Southern California
University of Toronto
Utrecht University (The Netherlands)
Valparaiso University
Wesleyan University
Windsor University Retirees' Association

Best wishes and Happy Holidays to all!



*~Janette C. Brown, Ed.D
USC*



Thoughts on an Emeritus College on Campus



The Emeritus College at Clemson University was organized in May of 2003. Since that time over 600 emeriti have been identified and become affiliated with the College. The twofold purpose of the College is: *1) to keep emeriti connected to the university for the benefit of extending the University's teaching, research and outreach missions and; 2) to continue the intellectual growth and stimulation of emeriti.*

In writing my dissertation almost 30 years ago, I discovered that retired professors do not tend to disengage. They tend to maintain professional contacts as well as participate in professional activities. They may write, consult, tutor or even conduct research well into retirement. And although some may take up a new hobby, travel extensively, or even retool for a new profession, most continue their earlier interests and association.

Thus, it behooves colleges and universities to find a way for retired faculty to remain connected to the institution. Some faculty want to continue to teach; others are interested in advising or mentoring; and still others are seeking involvement through committee work. Most faculty are not seeking remuneration for their services. In a recent study at Clemson, we found that “money” was a distant third in predictors of interest in emeriti returning to teaching.

So if emeriti want to stay involved, and it is economically beneficial to the university, then why not keep them involved? We have found that emeriti are anxious to return to campus and remain engaged. Through the Emeritus College we offer opportunities for social interaction and service on College committees which in turn, provide more opportunities for involvement by undertaking more projects!

For example: Our International Opportunities Committee is working with the Graduate School, International Affairs and the Alumni Office to establish Clemson Alumni Clubs in foreign countries. Our Emeriti in Action Committee worked with the University Curator to put together a library exhibit of works of emeriti since their retirement. And our Gen Ed Committee is currently shepherding a proposal through the curriculum system whereby a group of emeriti will teach a “current topics” general education course each semester.

Keeping emeriti involved is not without challenges. Often the infrastructure (office space, secretarial support, parking, etc.) is not conducive to retired faculty returning to campus. However, with a commitment from central administrative, expressed interest from the emeriti, and one or two champions, an Emeritus College or similar entity can become a reality. In this day and time of shrinking budgets, most institutions could use a free hand. Lastly, the goodwill that is generated when emeriti stay connected to the university may well lead to more gifts and/or bequests in later years.

~Diane G. Smathers, Ed.D., Director
 Clemson University Emeritus College
www.clemson.edu/emmerituscollege

Join In! Make A Presentation At The 2008 Conference



The theme of our upcoming 2008 conference is *Retiree Organizations in Higher Education: Values and Opportunities*. The theme will guide us in exploring the benefits of retiree organizations and how they are serving their members, campuses, and communities.

Toward this goal we are seeking presentations that showcase what retiree organizations are doing on college and university campuses and the benefits of this effort. We want to hear from those who have tried a new idea, learned from experience, found success with a project or effort, or who would like to explore a relevant topic or issue.

Consider sharing your experience with:

membership development.....topics for programs.....newsletters & communicating with membersofficer and leader development.....renewal & vitalization efforts educational programs.....volunteering.....relating to your institution.....serving your members.....awards & recognition.....services.....models.....other topics of interest.

Sharing your experience and knowledge will be helpful to someone at the conference! Those attending the conference will include retiree organizations in various stages of formation

including new groups, long established groups, groups working to revitalize, those seeking ideas for interesting programs and activities, and campus administrators. The types of institutions will vary and include small and large campuses, two and four year institutions, and those in both the public and private sector.

A variety of presentation formats are welcomed; especially those from our membership that are of a practical “how-to nature.” **Our goal is for those attending the conference to encounter ideas and information that can be put to work on the home campus.**

Presentations may be made by individuals or small groups from one organization or campus or may be collaborative efforts of individuals or groups from different organizations or campuses. Member organizations are encouraged to propose topics and themes for discussion in any of the following formats.

Poster Session—A casual format whereby a presenter is assigned a small area to display a poster or other visual material about a program or topic. Several “posters” are available at the same time, in the same area, and conference attendees individually visit and talk with presenters.

Round Table—An informal format much like a group discussion focused around a specific theme. Two to three presenters take 10 to 15 minutes to casually tell about their project or event with the remaining time allotted for participants to ask questions and join in a discussion.

Formal Presentation – The traditional style involving a presentation about a specific topic made by one or two persons to an audience and lasting from 15 to 45 minutes.

Panel Discussion—Several people are assembled to make comments and share perspectives about a specific topic or theme to an audience. The panel may last from 45 to 90 minutes.

Follow These Steps To Make Presentation At The Conference

1. Join in! Contribute a presentation about a topic, activity, event, or experience using one of the described delivery formats.

2. Submit a Proposal by March 28, 2008. While the deadline to submit a proposal for a presentation is March 28, 2008, we encourage you to consider submitting your proposal **before the deadline.** Early submissions will help the Program Committee to get a head start on planning an interesting and dynamic conference program.

3. Visit <http://www.arohe.org> to view proposal form and obtain additional information about making a proposal. The form will guide you in providing the information needed to make a proposal.

Proposals should include:

- *TITLE of the presentation,
- *brief DESCRIPTION of the topic and content of the presentation,
- *NAME(S) of the presenter(s) and the organization they represent.

Format Type—A variety of presentation formats are welcome and may include:

- *ROUND TABLES
- *POSTER SESSIONS
- *FORMAL PRESENTATIONS
- *PANEL DISCUSSIONS

4. Receive notification of acceptance from the 2008 Conference Program Committee.

Remember! March 28, 2008 is the deadline to submit a proposal with submission before the deadline encouraged.

Questions about submitting a proposal or making a presentation at the conference can be emailed to: arohe@usc.edu

~Linda Pearson
AROHE Conference Program Committee

An Approach to Retirement



There are two ways to leave the work world, and I wanted to take the more desirable one and not die with my high heels on, so I knew I would retire some time, but had made no decisions about when, and I never talked about it at work. But I did prepare in advance .

I did an assessment of my pension and other wealth. This is easy; there are lots of tools available for this. I had over 33 years of UC service when I retired and had socked away tax deferred money, so I knew I could afford do retire whenever I wanted.

More difficult was what I was going to do and who I was going to be. Several years ago I worked with a friend who was training to be a career coach, and I was her trainee subject, I knew I wanted to talk through issues of retirement with someone. We worked together for several months and then formed a small group of friends. To talk out our worries with others was useful to me. Then finally I sat in on the pre-retirement planning program offered by the Berkeley campus which was very useful.

Why people retire...

When you retire may not be your choice and you, like me, may not have a long lead time. You may need to retire unexpectedly because of illness or injury to you

or your partner or parent. Your mother may break her hip and need your help, You may be reorganized out of a job, get a new grouchy boss, or just wake up one day and realize it's time to get out of there right now. SO BE PREPARED.

Preparing for retirement....

Lots of discussions of retirement make assumptions about personal circumstances that may not apply to you. For example, are you going to retire as a couple and hang out together? Are you partnered, but retiring alone like me whose husband may never retire, Are you a single who's worried about being lonesome? One friend didn't want to retire because her disabled husband was waiting at home for her to be there full time to entertain him and be his nurse. She dreaded it. Other women tell stories about retired husbands who follow them around all day and never leave them alone. When you retire will everyone look to you to be the family caretaker and maid? Set your boundaries before you get stuck in a rut you never wanted.

Steps for pre-retirement planning are not complicated: Financial planning, See a financial planner and review all parts of your fortune to make sure your money will last as long as you do. Make sure you budget for play, not just for rent and other basics. Factor in inflation. Know about your pension and other employer-sponsored savings plans. If applicable, make an appointment with the Social Security Insurance office and go over that part of your pension. Analyze your spending habits. Are you frugal and save for a rainy day or spend freely? Will you have to change your lifestyle in retirement? Can you save more now?

Legal/estate planning. Make sure you have a will or trust, that your beneficiaries are the ones you want, that your discarded lover doesn't get the house, that

your ex isn't the beneficiary of your life insurance, that your deceased sister isn't named as your executor. Make sure the right person gets the family silver. Don't leave your family and loved ones in a financial muddle if you are hit by a truck tomorrow. Make sure your affairs are in order, that your kids can find your assets. Do this now.

Housing. Learn about this, if not for yourself, for your elderly parents. Know what's out there. Some senior residences won't take you if you are too ill or too old. It's nothing you have to act on now, but also don't take the attitude that you are going to live in your own house forever no matter what. Moving to the country may sound romantic, but how many of us see elderly relatives who find themselves isolated geographically when they can no longer drive or trapped in their homes by physical barriers when they can no longer climb stairs. Maybe it would be more fun, less isolating to move into a senior residence in a metropolitan area while there's still time to make new friends and enjoy the activities there rather than be carried out of your house and plopped in a lonely nursing home.

Your body is your temple, take care of it now, so you have a happy old age. "I'm too busy now" is a really lame excuse. Join the Y aerobics class before work, make new friends, do something regularly, not just weekends. Your plans in retirement could be seriously impeded by premature old age related health problems. Being retired doesn't equate with being a little old lady, and when that time comes, you want to be a spry one.

What do you do with yourself for those 16 or more waking hours each day when you are no longer the Coordinator of XYZ or the Assistant Vice Chancellor of ABC or otherwise mainstay of your work

situation.? One of the most difficult emotional challenges is to recognize that your department will get along just fine without you. They may even hire 2 or 3 people to replace you. It's not your responsibility to keep the operation afloat. They will manage without you. And so you can retire whenever you want.

Test drive some possible activities while still working to see if you like them. Is there a book in you waiting to burst out? There are lots of yummy plots around a University. Death in a Tenured Position is already taken, but you can certainly think of many others, or a self-help book, or something related to your professional expertise. Stick your book outline in your file.

How do you spend your spare time now. Would you like to develop those activities when you have more time? Do you have good models for retirement in friends or parents? Do you have bad models you don't want to replicate?

Some people are so worried about retirement that they overbook themselves. Advice from all experts is not to commit to too much too soon. Someone asked me what would I do the very next day after retirement! That person should never retire! For me, I took the first month as a vacation and then started thinking about what's next. Of course I retired very suddenly, but even so, I not sure how much I would have wanted to set up far in advance.

Work in retirement. I'd like to stay a little about this. I was planning on tossing all my panty hose and cleaning my closets first thing when I retired. I haven't done either yet. I've been back to work, but it's very different. Several jobs have found me since I retired in July, 2006. I taught pre-retirement planning at the UCB Retirement Center over the past year and was acting

director this summer. I did a little work for a local music group. I have a small consulting gig for a university in Denver, I'm now helping to start a new multi-campus School of Global Health, so I'm headquartered at two different locations for that. These jobs differed from my 30-year University career in important ways. All the jobs I've done are all short term, nothing indefinite, they are part time and give me some flexibility, they are one-issue assignments, no juggling the million projects I did before, and most important, I am not the responsible party. The buck does not rest here! Also, I can just say no. It's my choice. So maybe I'm not a good model for successful retirement – but maybe actually I am. I tutor, I take classes, I belong to a knitting group, a book club, I run a medical support group. I have more time to be a Nana, a sister, a friend. I'm still looking forward to a little more leisure, I have a stack of books to read, a pile of new knitting and quilting patterns, But I feel very comfortable launched on my new phase of life as a working retiree.

Transition from full time work to retirement was a transition into the unknown, but for me it's been a great move. Oh yes, the people you meet who've retired all look great, but there are also people you don't meet because they don't come around who are lonesome and bored. A friend retired and moved to the country because it was cheaper housing. It took her a miserably lonesome year to meet anyone and find useful activities. Another friend retired recently and has been happily reading, meditating, biking. Eighteen months later she's just getting ready to explore, no longer considering herself on vacation.

You have to take control to achieve the right balance, no one else will do it for you, and it's an ongoing balancing act that for me will surely change as I get

even older. Consider keeping a diary of your thinking about retirement and then your journey into it.

Think about yourself ten years from now. As you age, what will your clothes be like, will you be working, will you be proud of your accomplishments in this period? What will you be doing with your leisure time? Will those 7 days a week and 16 hour days stretch out in front of you or will the hours in the day be way too short?

What am I doing now? I may not be very successful at retirement, but my original worries are over. I'm sure I'll have new ones as I morph into later stages of aging and figure out how to be a successful old lady. But I'm not there yet and life is good.

~Ellen Switkes
Assistant Vice President,
Academic Advancement, Emerita.
University of California

MARK YOUR CALENDAR!!!

What: 2007 CURAC Conference

When: May 21-23, 2008

**Where: University of Concordia
SGW Campus,
Montréal, Quebec**

Website: <http://www.curac.ca/>

