The title of the AROHE Eighth Biennial Conference suggests its overall focus on the future both of university and college retirement organizations and of individual retirees, in light of current changes in society and academia. Several themes recurred over the course of the conference, many introduced in the initial plenary address: responding to the changing American demographic, particularly the aging of the population and its greater longevity and health; offering incentives for, and easing the transition into, faculty retirement; gaining recognition and influence for retirement organizations (RO's) and retirees on campus and off; balancing self-interest and altruism; and multiplying retirees' opportunities to contribute to the mission of their institutions (arguably a goal both self-interested and altruistic, since by contributing to their institutions, retired faculty retain their sense of identity and purpose).

The conference had 135 registrants, representing approximately 75 institutions of higher education in the United States and Canada. It was, according to the organizers, the largest AROHE conference held so far. There were two plenary addresses, one plenary panel, and nine sessions (divided into groups of three concurrent sessions, each on a different topic). Synthesizing all of the material into a single coherent report proved virtually impossible, so what follows is a transcription, somewhat condensed, of my notes from the addresses and the sessions I attended. At the end is a list of actions I believe that TURFA should take, based on what I learned at the conference.

Monday, August 15

**Plenary Address: Transforming Retirement—The Big Picture: What's Coming and Why.**

Fernando Torres-Gil, Professor of Social Welfare and Public Policy and Director of the Center for Policy Research and Aging, UCLA.
Torres-Gil explained that we are on the cusp of real transformation in aging and retirement: what does it mean to have a third and fourth quarter of life, given the possibility of 2-3 decades of life and health after retirement? First, he laid our the **Big Picture**:

- Demographically, we can expect greater longevity and increased life span for most (but not all).
- The public narrative increasingly views us (academics) as a "privileged group."
- The public (the electorate, politicians, pundits) increasingly questions the value of, and our role in, higher education.
- Diversity and the aging of Baby Boomers are key trends reshaping the public narrative; we are moving toward a majority minority society (that is, one in which minorities make up a majority of the population). Between 1960-1980 was a golden era in American history, when the public believed in the social contract and in investing in higher education, although there was social unrest similar to what we are facing today.
- Given that the public narrative has changed dramatically, retirement is changing as well.

This context gives rise to certain **Policy Challenges**. Retirement as we know it is changing. We may be the last to enjoy the legacy of the previous century (e.g., a measure of financial security). We enjoy certain benefits and guarantees, yet we struggle with meaning and encore roles.

(Torres-Gil noted that much of society doesn't have this luxury, leading to the public questioning mentioned above.) In addition, public institutions face fiscal pressures and public resistance, while private institutions face competition and market volatility. Families and students struggle with disillusionment and debt. According to Torres-Gil, we need a feedback loop, factoring in, early in our careers, the perceptions and interests of taxpayers, legislators, and governors. The next POTUS administration, whichever party wins, will have to address entitlement reforms, budgetary pressures, and the shifting role of government. Older persons traditionally vote at a higher rate than other segments of society (such as younger and more diverse groups), and while many if not most older voters do not necessarily favor a progressive agenda, the votes of academics such as ourselves matter. [NOTE: Torres-Gil seemed to assume, perhaps correctly, that most academics are progressives rather than conservatives.]

**The Challenges and Opportunities** for colleges and universities include 1) meaningful roles, innovative models, administrative incentives, and best practices for retirement; 2) avenues
for transitions from work to retirement; 3) the need to maintain pension and retirement security while addressing retirees' psychosocial needs (there is a move away from retirement benefit plans, said Torres-Gil, noting that the public believes we have too much in the way of benefits); 4) tension between older faculty and younger/diverse faculty and staff—retirement should represent opening the pipeline while creating options to continue and/or give back. The **Key Conceptual Frameworks** include the concept of four quarters of life, the movement to a majority minority society, and shifting notions of the social contract. Individuals must devise a "Personal Longevity Plan," based on the assumption that they will live to be 100. Such plans consider issues of financial security, the vicissitudes of aging (e.g., chronic health conditions), and aging in place. On a larger scale, we need to resocialize pre-retirees at younger ages to envision and plan for a post-retirement in which they contribute their contributions to society. Torres-Gil concluded by presenting a number of key questions for conference attendees, such as how his ideas might be relevant for transforming retirement, how they might inform the conference objectives, where self-interest ends and altruism begins (specifically, the altruism of moving aside to allow younger, more diverse faculty to enter the pipeline), how a Personal Longevity Plan might be part of pre-retirement initiatives, and how retirees' immediate concerns might make room to incorporate broader contributions to society (advocacy for students, minorities, and young faculty and staff).

Group discussion after the address pointed out that current retirees might indeed face changes in terms of future financial security. Consequently, this generation needs to be able to advocate for itself with legislators, other organizations, and the rest of communities (as the AARP has successfully done). Audience members also observed that for some senior faculty, the option to retire is out of their control: although pensions systems did okay during the recession, retirement funds like TIAA did not fare as well, and many people cannot afford to retire.

Early in his talk, Torres-Gil had alluded to the Age Discrimination in Employment Act (ADEA) and the issue of mandatory retirement. In the absence of mandatory retirement, schools can encourage faculty to retire by making them comfortable with the idea of retirement and by offering phased retirement programs, such as those already offered by many medical schools, in
which faculty receive an incrementally reduced teaching load, with continued benefits and full or partial salary.

Asked to clarify his position on mandatory retirement, Torres-Gil said that he had come to favor it, primarily because he was moving toward advocating for children and investing in the education of minorities. Younger faculty tend to be more diverse, while FTE's have become fewer and farther between. Torres-Gil suggested that those of us who have some security may decide to say, "It's time for me to step aside." Unfortunately, an intransigent portion of senior faculty—often white male faculty, 70-80 years old—don't retire, perhaps fearing a loss of identity and sense of purpose. For such people, mandatory retirement might be the tool needed to get them to move along.

Members of the audience pointed out that when senior faculty retire, their positions are not going to be filled immediately by professors: typically, the administration is going to hire more adjuncts. Sometimes faculty do not "step aside" because they are concerned about maintaining continuity within their discipline or subdiscipline. During the Great Recession and the consequent budget cuts, universities offered incentives for retirement, then asked, "Why should we hire highly paid professors when we can hire four adjuncts and teach more students?" Universities saved money, but at the detriment of the institution. Over the past couple of decades, 51% of full-time positions have been eliminated. It is not the old people who are creating the bottleneck in the pipeline for recent Ph.D.s, but the reduction in tenure-track positions. Adjuncts are not going to change a young student's life by, for instance, recognizing his or her potential and recommending graduate school. Torres-Gil responded that the situation underscored the importance of the public narrative, what "they" think of us. Maintaining integrity and excellence in higher education depends on how we market and brand ourselves to chancellors and state legislatures.

**First Session: Rewriting Association Programs and Services.** Cary Sweeney, Director, Berkeley Retirement Center.
Sweeney began by showing advertisements that portrayed positive images of older adults, for instance, engaged in energetic activities or demonstrating an individualistic, "do it your way" attitude. Driving the change in today's retirement, according to Sweeney are 1) the increased aging of the population; 2) the gender revolution; 3) more variation in work and life course; 4) variable security in employment or retirement/uncertainty about retirement savings.

1) Longevity—by 2050, 25% of the American population will be 65+. Longevity is still tending to go up.

2) Gender—More women are having few or no children. The choice to have children will change how women work. Women who have children may be starting their careers later or pausing their careers and returning to them later.

3) Work variation—People are working longer. Starting in the 90's, a greater proportion of people age 65+ remained employed. Among professors delaying retirement, 69% cited economic concerns (unsure of sufficient funds, maximizing SS, retaining health insurance benefits), while 81% cited personal/professional reasons. The predominance of personal or professional reasons for not retiring reflects the psychology attached to working: the desire to stay busy and productive, the love of the work itself, and the continued access to, and affiliation with, the institution.

4) Variable financial security—Traditional pensions are being phased out, leading to anxiety. Defined benefits are decreasing, while retirement accounts are increasing.

How are these forces impacting retirement?

- People are moving in and out of working, following non-traditional or non-linear paths to retirement.
- People are working longer, delaying retirement, and working in retirement.
There is a shift in the meaning of work from more relational to more transactional between employer and employee. People are seeking new, more meaningful work later in life.

Sweeney observed that the "reinvention of retirement" can be seen through two opposing constructs, one in which traditional retirement is contested/disputed/challenged (the emphasis on new patterns and multiple careers) and another in which retirement remains a distinctive experience, though altered (emphasis on variation in timing, change in nature of retirement experience, new meaning of "retirement").

What does all this mean for RO's?

- RO's will be busy.
- Retirees will be busy.
- The retirement experience will be different for each retiree.
- Lifelong learning will be more popular.
- Retirees may need more support in navigating retirement.
- Emeriti and retirees are looking for meaningful roles, and campuses need help in creating these.

Several existing programs can serve as models:

- The American Library Association Personal Learning Networks (PLN)--such networks recognize the desire for learning and support a new phase of learning and adventure in later years.
- The UC Berkeley Emeriti Representatives—there are 30+ department representatives; the program was started as a way to help campus departments engage emeriti.
- The UC Berkeley Office for Strategic Planning—the Office oversees adding emeriti to campus committees (recruitment, planning, etc.), because such committees need deep institutional knowledge; emeriti mentoring of first generation students (those who are first in their families to attend college); and operating the transition network (https://thetransitionnetwork.org) for women 50+, who engage in small group interactions and programs.
The Q&A and "Table Talk" in this session brought to light a number of ways in which universities are engaging, or can engage, retirees positively. For instance, they can offer coaching programs and resources for caregivers to aging relatives. U.C. Berkeley presents a lecture series on "Healthy 100 and Beyond." RO's, in conjunction with Human Resources, can incentivize people to prepare for retirement as early as 10 years out, by arranging talks by representatives of TII and the state pension program and by creating webinars on relevant topics. As for ways in which retirees can continue to contribute, RO's can establish programs in which retired faculty mentor students coming out of foster care (UC Davis); career mentor students, younger faculty, and faculty approaching retirement (U Vermont); return to reaching for a limited period on partial salary or participate in special projects (UC Berkeley/ ENCORE); or participate in graduate students’ oral exams.

It was noted that administrations sometimes resist retiree volunteerism because they lack the flexibility to accommodate people coming back to campus. There may be liability or confidentiality issues. Participants recommended taking the conversation back to the administration, setting up signed agreement and creating new designations for retiree roles. "Check with other institutions for comparable programs: if another school has it, you campus might want it."

Opening lines of communication with administration and other campus leaders is crucial:

- Hold "Coffee with Campus Leaders" meetings—invite individual administrators (president, provost, vice presidents, deans, and other campus leaders (president of the alumni association, director of HR, etc.) to conversations prior to RO Board meetings, emphasizing not what we cant from them, but asking how we can help them advance their interests).
- Invite campus leaders to Board meetings.
- Have an emeriti representative with voting privileges on the Faculty Senate.
- Meet every year with the provost and the president and 2-3 times a year with HR.
- If possible, get an emeriti representative on the Board of Trustees.
- Get emeriti on influential university committees (e.g., Accessibility, Arts, etc.).
Second Session: Developing and Growing a Campus Retirement Organization. Sue Barnes, Director, UCLA Emeriti/Retiree Relations Center and past president, AROHE, and Janette Brown, Executive Director, AROHE, and Assistant Vice Provost, USC Emeriti Center.

[NOTE: This was probably the most practical and useful session I attended. I was told that Barnes would make a good contact person for information and advice.]

Barnes describes support of retired staff and faculty on a continuum: Involve retirees in existing programs/initiatives > Increase retiree benefits, programs, etc. > Establish retired faculty/staff association > Establish Center or Emeriti College. She presented a table listing the characteristics of the three different retiree organization types. The Retiree/Emeriti Association is a unique entity but affiliated with the university, similar to Alumni Associations, membership-based, and usually primarily dues-funded; sometimes partially campus-funded. A Retiree Center is the office of record for retirees, is usually not membership-based but serves all retirees, often provides administrative support to retiree associations, and is campus-funded. The Emeriti College is scholarship and research focused, usually serves retired faculty only, and usually has hybrid funding (campus funded, endowment, foundation, and membership/fee-based). Barnes suggested that the more similar an RO is to an alumni association, the more support it will get. Barnes presented another table listing the primary functions of each organization type. For the sake of brevity, here are the primary functions of RO's:

**Most significant**

Connects retired faculty/staff to each other and the campus

Advocates for retired faculty/staff

Offers educational workshops, scholarly activities

Offers social programs

**Less significant, though still important**

Facilitates opportunities for teaching, mentoring, service

Coordinates legacy projects
Offers research stipends

Offers retirement preparation classes

Barnes used UC Davis and the University of Southern California to illustrate different ways that RO's, Emeriti Associations, Retiree Centers, Emeriti Centers, and Emeriti Colleges relate to one another on different campuses. A third table compared the sources of funding for RO's, Centers, and Emeriti Colleges. For RO's, dues are the primary source of funding; revenue (events, services) and fundraising (usually for scholarships) are the secondary sources of funding; partnerships/sponsorships are tertiary; and campus funding is occasional.

Here are Barnes' recommendations for growing a retirement association:

**Tune in to your campus' radio station, W.I.I.F.M. (What's In It for Me?).** Identify the ways that the organization can meet the needs and interests of the campus and its constituents. For instance, at the University of Washington, the RO partnered with Story Corps to record the stories of retired staff and faculty.

**Find your champions.** One or two high-level administrators who believe in your cause. Aim for the highest level you can get: chancellor or president, provost, deans.

**Make friends in high places.** E.g., high level retirees. When the retiree association at UC Davis initiated a push for a retiree center, the provost was a champion of the pilot program. The RO asked the provost to create a task force to study whether/how it could be done. The task force created a written proposal (there is an example on the AROHE web page).

**Wiggle your way in.** Find ways to serve on task forces and committees ("it never hurts to ask"). At "Coffee With Campus Leaders," ask what is on the leader's mind and how the RO can be of help. For example, emeriti are helping the library to move to the digital age.

**Toot your own horn.** This is vital. Always be letting the campus know how you're contributing. During the recession, U. Washington and UC Davis lost funding for their Retiree Centers—everything can change overnight. Let the administration know through the campus newspaper and/or campus newsletter and through HR the value you bring to the university.

**Demonstrate retiree "return on investment."** For instance, calculate the financial contributions retirees are making. At USC, the lifetime giving of retirees was $80 million; at UC
Davis, it was $96 million. Get that number: go to the Development Office, which can break it down by year and by scholarships, buildings, etc. The UCal System conducts an emeriti survey every three years that includes emeriti from all 10 UCal campuses. The survey, the most recent of which garnered 1,619 responses, asks what contributions retirees and emeriti are making. It is a very powerful document. The UCal emeriti survey discovered that 39% of retirees taught at UCal, 56% wrote books or articles, 61% had academic work in progress, 44% provided other service to UCal, and 46% volunteered outside UCal. The results were reported in the Chronicle of Higher Education. Get your people involved in drafting such a survey (the UCal emeriti activity survey is available online at cucea.ucsd.edu). The survey could be taken online, but it was sent via mail in some cases, with each campus funding the mailing costs.

**Put it in writing.** Whatever it is you want from your university, get it in writing (e.g., proposals for centers, space, emeriti college). Prepare a document of campus needs and how your RO can add value; contributions retirees make to campus; comparison of other colleges/universities; budget/funding sources; and space needs.

Resources for developing RO's can be found in the AROHE Start-Up Kit (http://arohe.org/Management), Retiree Center/ Emeriti College Proposals, UC Davis Retiree Center Space Proposal. Donations can be encouraged by "Thank you for your sponsorship" acknowledgements in the RO newsletter. Consider going to a retirement community for funding—make friends first and create a partnership (for instance, by providing speakers).

Brown took the podium to describe retirement transition programs within the UCal System. She recommended Googling those of UC Davis (http://academicaffairs.ucdavis.edu/training-and-development/pre-retire-wkshp), UC Berkeley (http://retirement.berkeley.edu/prp), and UCLA (https://www.chr.ucla.edu/benefits/ucla-retirement-workshops-1). Such programs address both financial and non-financial aspects of retirement over the course of 4 sessions, one per week, 12 hours total. While programs combining both faculty and staff are possible, faculty are more likely to attend those classes that are restricted to faculty. Notices announcing the sessions come out of Academic Affairs. HR staff teach the session on pensions; a Fidelity representative teaches the retirement income and SS session; a panel of retired faculty offers personal perspectives and recommendations for making the transition; and a gerontologist addresses the emotional aspects of retirement. While
there are no grant providers to fund the program, TIAA and the state pension system may be sources of funding for transition events in return for publicizing their programs. (At one campus, the college deans funded interested faculty members at $90 a person.) Since not every participant will be able to attend every session, as much content as possible should be put on the web.

Brown then turned to RO's interactions with administrators and other campus entities. She raised the question of the right number of people to serve on an RO Board (or Executive Committee). Each member needs a specific role, she said, and "term limits are good." Administrations are more receptive to pilot programs than to immediate long-term commitments: from their point of view, they are providing only one-time money. It helps to have groups writing in support of programs proposed by the RO. For each program or project, you need to have the right people at the table, such as HR, Academic Affairs, Development, and Alumni Relations. Osher, which has an endowment, is an important ally; Marketing and Public Affairs can help with website development. Brown recommended that RO's pair with other programs and/or offices for specific projects.

Finally, Brown discussed RO recruitment and participation. UC Davis hosts a new retirees' reception in June, before people retire. Board members attend the reception, and there is an association table at the reception. The president and even the chancellor attend. As hokey as it sounds, Brown said, visible recognition for retirees is important (a red carpet, stars in the program, etc.). Three weeks later, the university holds a Retiree Resource Fair, where new retirees can receive a retiree i.d. card and free parking pass and sign up to volunteer. Again there is a table for the Retirement Association, which enrolls as many as 50 new members. Incentives for joining include day trips, tours of campus venues, and reduced prices for events, all only available to members. (To entice retirees to join the Association, a notice of events is sent out to all retirees, listing both member and non-member prices.) Another lure is to offer pre-retirees a two-year membership for the price of one year. Invite members to participate in the living History Project, in which their recorded interviews are archived in the library, uploaded to YouTube, and broadcast on public radio.

Only a small percentage of members are going to be interested in Association activities, Brown said: if you're meeting member needs and if you're getting 10% of retirees, those goals
are sufficient. As for retaining members, people who have not renewed for a year or two should be sent two email notices. If the emails do not receive a response, get on the phone or send a letter. To facilitate renewal, offer rolling membership (e.g., from March to March), automated renewal with credit card, and online renewal (as well as online event registration).

Tuesday

**Plenary Address: Colleges and Universities as Models, Facilitators, and Champions of Reformed Retirement.** Carole Goldberg, UCLA Past Vice Chancellor for Academic Personnel.

Like other speakers, Goldberg began with a list of challenges facing higher education: 1) reduced state funding and tuition pressures; 2) growing undergraduate enrollments; 3) limited opportunities for new Ph.D.s; 4) the need to improve diversity among professors and staff, which is hard to achieve if turnover is slow; 5) growing regulatory and compliance demands, leading to a demand for more administrative staff; and 6) overall, a need to do more with less. The "givens" with which universities must deal include a large cohort of Baby Boomers, improved health and longevity of most Americans, the tenure system, and the absence of mandatory retirement. At UCLA, Goldberg observed, there is a generous defined benefit retirement plan, whereby a faculty members can retire with 100% of salary after 30 years of service; nevertheless, 250+ people in this category are still on the faculty, and nearly 15% of the Faculty Senate consists of faculty with over 35 years of service. (Goldberg explained that the focus on "years of service" avoids issues of age discrimination.)

The solution (or a solution), said Goldberg, is to see retired faculty as a "magical resource": to shift some faculty onto the retirement system, then recapture the work they want to do, thus retaining the talents, contributions, and institutional knowledge of long-time employees. Then, universities can use the savings to hire new faculty. The results of this view of retired faculty in the UCal system are recorded in "A Virtual Eleventh Campus: An Inventory of U.Cal. Emeriti Activity" ([http://cucea.ucsd.edu/documents/AVirtualEleventhCampus.pdf](http://cucea.ucsd.edu/documents/AVirtualEleventhCampus.pdf)).

Faculty are reluctant to retire for a number of reasons, many of them touched on previously in the conference:
• Financial concerns
• Psychological concerns/ loss of identity
• Loss of resources to continue their work
• Diminished institutional commitment to subdisciplines (i.e., they want to be replaced by someone doing exactly what they did, although disciplines change and evolve)
• Doubts about the legitimacy of the retirement process: lack of transparency in post-retirement, causing individuals to suspect that they would be treated worse than others/ unfairly

To combat the reluctance to retire, a radical reconception is needed, one which proposes retirement not as a severance of the relationship of employee to university, but as a reconfiguration of the relationship. The "Old Vision" of the university's role in retirement was to provide financial counseling and post-retirement programming (sending the retiree to a new life distinct from the university). The "New Vision" combines this old role with several new roles:

• **Education** about the value of retirement personally (gain vs loss)
• **Incentives** for retirement, both before and after
• **Recognition** for the value/contribution of retired faculty
• Creating **opportunities** to find fulfillment through a new relationship to the university

**Education**

UCLA created a new position, the Faculty Retirement Liaison, occupied by an emeritus professor, on recall at 20% of his active pay. The liaison meets one-on-one with faculty, giving guidance especially on how to negotiate with the department chair. The retirement liaison, because he knows how everyone is doing in his or her retirement agreement, lends greater legitimacy to the retirement process.

Another UCLA initiative to educate faculty about retirement was creating a series of workshops. A letter announcing the perks of retirement and the workshop goes out to all faculty.

**Workshop I: Navigating the Dual Retirement Process to Ensure Success**
Workshop II: Continuing Professional Involvement After Retirement—faculty from different disciplines share experiences, research, scholarly involvement, teaching, and service; how to continue to do the things one enjoys.

Workshop III: Mechanics of the UC Retirement Process—retirement counselors explain how to maximize benefits.

Incentives

Faculty negotiate individual pre-retirement agreements with the administration, determining dates, reduced teaching load, support for closing out projects, terms of paid or volunteer recalls, etc. Note that these agreements cover both pre- and post-retirement benefits. Last year, 68 agreements were signed at UCLA.

Other incentives applying to post-retirement may include: with the dean's approval, a working title for a research professor; an office space policy; a policy concerning endowed chairs (whereby the donor and the dean allow the chair-holder to continue to receive endowment funds for a fixed period); and discounts (parking, Faculty Center, etc.)

Recognition

Recognizing past and current achievements of retired faculty is an important means of signaling that the institutional relationship has not been severed. Emeriti faculty attend an events reception at the Chancellor's house. The Vice Chancellor's office displays works by emeriti Fine Arts faculty. In order to recognize emeriti who have made extraordinary contributions, awards are given for scholarship, teaching, and service post-retirement.

Opportunities

By recalling emeriti faculty for research, teaching, and services, universities can hire new faculty and still be ahead financially. The UCal system also operates the successful Emeriti Mentoring Program for Associate Professors, includes emeriti faculty on the Faculty Senate and in administrative leadership positions, and works with programs such as ENCORE (http://encore.org/encoreu) to draw upon retiree experience and skills.

The challenges that lie ahead for UCLA include extending initiatives to staff as well as faculty; addressing the university's relationship to retirees who volunteer (compliance issues such
as sexual harassment awareness, lab safety training, NIH restrictions, and liability issues); engaging people earlier in their careers; expanding post-retirement services connecting campus and community to retirees; and increasing recognition for the value provided by retirees.

During discussion, Goldberg emphasized the need for retirement reconfiguration to start at the top. The Facult Retirement Liaison has monthly meetings with the Chancellor. An audience member pointed out that faculty may not stay at institutions more than five years. Goldberg demurred that while people tenured at UCLA don't do so much moving around, we still need to make our institutions places to which people want to make a commitment. Universities may be hiring more short-term employees and faculty, but they are also adapting to a changing professoriate by creating positions focused full-time on teaching and teaching innovation and by offering lecturers greater employment security.

In response to questions, Goldberg clarified that recalled faculty and staff at UCLA get paid (the salary is negotiated in the pathway to retirement agreements). There are Medicare-related limits on how much people can be paid. Even with such payments, Goldberg reiterated, it can be economically advantageous for universities to work out such arrangements. It is important that the Faculty Retirement Liaison be the right person and the university have the right understanding with that person. The liaison must maintain confidentiality with faculty members thinking about retirement who may not year want administrators to know. At the outset, it must be clear that there are some things the liaison will not share with a dean or vice chancellor. There will come a time, Goldberg waid, when retirees will wish to disengage, but that time will become later and later in life.

**Third Session: Advocacy Through Campus Partnerships.** Dorothy Zingmeister, Prof. Emeritus, Biology, Kennesaw State University.

[NOTE: The session was billed, in part, as "Strategies for building on-campus partnerships between retirement organizations and campus administrators to share concerns that mutually benefit campus and retirees. Finding policy and program directions that transform career trajectories and create post-retirement campus and community engagement." I chose this session over other concurrent ones on the basis of this description. However, the session turned out to be
solely concerned with creating a retiree council within a university system. Only after her presentation did Zingmeister explain that there were originally supposed to be two presenters, but her co-presenter had fallen seriously ill and could not be there. Although that person's name had been removed from the program, the session description had not been changed. Like another attendee muttered as he left at the end of the session, "I wish she had told us that at the beginning." The content of the presentation was not of any use to TURFA at this point in our development, because so far we are the only USM campus with a RO affiliated with AROHE. However, the topic did bring home the advantages of having other RO's within the state system with which we might ally ourselves.]

The University System of Georgia resembles USM in that it has one chancellor for the system and a Board of Regents for the system, a governing body for all 29 institutions that sets policy and approves programs. The Retiree Council for the USG has been in existence for two years. The Retiree council is patterned after the USG Faculty Council and the USG Staff Council and includes one retiree representative from each institution. The System Office liaisons are also members of the USG Retiree Council. The Council is designed to be a partnership between the System Office and USG retirees. The advantages of such a council include consistency, some voice in policy decisions, sharing of best practices, communications, opportunities for retirees, and—from the System's point of view—a single voice as opposed to 29 separate institutions serving as a communication conduit. The USG Retirement Council Bylaws outline strategies for communicating with all parties (institutions with the Board of Regents with the Retirement Council with the Retirement Associations). The Retirement Council meetings are attended by the system Chancellor, the Vice Chancellor for Academic Affairs, the Associate Chancellor for Academic Affairs, and the Vice Chancellor for Human Resources. The RC

- Works with campuses to establish and develop effective RO's
- Works with the Board of Regents (BOR) staff to establish a USG Registry, an online pool of people who have expertise in an area, some of whom are faculty who want to teach some more
- Works with BOR staff to explore phased retirement options for USG employees
• Works with BOR staff to develop polices and practices that facilitate retirement transitions
• Works with BOR staff to promote and share institutional and system-level best practices for pre-retirement, retirement, and post-retirement
• Serves in an advisory capacity on benefit plans
• Promotes understanding of the impact that proposed plan changes may have on retirees
• Advises on other issues as needed.

The faculty constituency of the RC serves to counteract the business model of higher education coming from the business people serving on the BOR. The RC also allow for the compiling of contact information about, and (through newsletters and a listserv) communication with, all retirees system-wide.

Challenges facing the USG RC include the facts that some institutions in the system have not appointed a representative to the council, that some representatives to the council are not retirees, that some institutions do not provide travel funds for retirees, that several institutions have no RO, and that retirees often are not quick to volunteer to serve as representatives.

Prompted by my question about on-campus partnerships, Zingmeister and other attendees at the session did offer a number of disparate suggestions and observations. Activities for retirees offered by RO's include tours, museums, gardens, lunches, and "Passports and Pastimes," presentations where retirees share their travel experiences. RO's can bring issues to the president, who can delegate them to HR, Finance, or whatever office oversees the issue. The USC RO stays on the administration's radar by offering a scholarship for high school students: the scholarship involves the RO with the dean of Financial Aid and other finance offices and helps with the organization's recognition on campus. Administrators attend the showing of documentaries created by filming faculty and staff oral histories. Surveys, such as those of faculty post-retirement activities, can be presented to the university as a means of providing both useful information and recognition. A scholarship for descendants (grandchildren primarily) of retirees is another way to cultivate recognition and good will. Partnerships with the Development Office and the Alumni Association are particularly valuable for RO's.

Claire Van Ummersen, Senior Advisor (Ret., American College of Education, President Emerita, Cleveland State University.

Van Ummersen focused as much, if not more, on higher education generally as on retirees in 2030. She pointed out that universities will find themselves increasingly in a financial bind, with a need to increase revenue and decrease costs, for instance, by relying more on contingent faculty. Technologies have not proven as disruptive as at first predicted: MOOCs, for instance, have leveled off. Technology, however, is constantly changing, and we are beginning to blend different ways of delivering course content. Senior faculty need training in the use of new technologies and in working in teams. (Five generations of faculty, Van Ummersen noted, are working in our institutions, and research shows that—contrary to popular opinion—the most productive faculty are senior faculty.) There are three areas where change will be needed:

1. We need to improve how we use funds to educate younger people, change how we look at academics (redesigning courses in terms of content, method, and delivery).
2. We need to monitor retirement and pension plans, which are changing in both the public and private sector. 70% of pension plans are funded in state institutions, 10% in municipal institutions, and 100% in private institutions. With so many Baby Boomers retiring, more funding is going to have to come out of the government (Medicare, SS, pension plans). Legislatures will "spread the pain": pensions and SS will be less. RO's will need to become on-campus advocates for retirees, serving in the Faculty Senate as a voice to speak for retirees.
3. We need to change the culture of institutions, completing the movement begun in the 1960's toward greater diversity—working together in the institution and the community to create an inclusive environment.

RO's must continue to use the resources we already have to keep retirees connected to the universities. Universities need to consider how best to use retirees in the world we'll be living in. RO's assist the faculty and institutions to achieve mutual benefits: the institution to help retirees transition, the retirees to help the universities with their teaching, research, and service. AROHE's role can be to offer workshops and consulting services, proposing solutions, sharing best practices, and creating regional consortia.
Gary Crouse, Emory University Emeritus College Director.

Crouse echoed Van Ummersen regarding financial pressures on universities and their response to those pressures, as well as regarding faculty's reluctance to retire. He pointed out that the proportion of tenured to non-tenure-track faculty is currently 50-55, observing that retirement issues may be different for the two groups.

Emeriti colleges, Crouse said, are not primarily social organizations, should stimulate the life of the mind, and should be part of the university rather than separate from it, with emeriti faculty interacting with active faculty. He asserted that the degree of university support for retirees in an indicator of their perceived importance. The ideal is a partnership of retirees/emeriti colleges with schools/colleges to work on shared goals, to establish retirement as a desirable transition, and to allow new faculty hires and faculty diversity. Crouse added that changing faculty culture and changing the understanding of retirement are neither easy nor quick.

Trudy Fernandez, Director of Human Resources Relations, Florida International University.

From the point of view of Human Resources, employee financial literacy (especially among staff) is a particular concern. Another concern is creating a culture of engagement (avoiding the lament she once heard from a retiree, "No one ever reached out to me"). It took seven years for Florida International University to be recognized by the *Chronicle of Higher Education*’s list of "Great Colleges to Work For."

The university's RO was founded in 2013 and gone through three phases. In phase 1, it concentrated on social and recognition events. In phase 2, it expanded to pre-retirement planning programs and workshops, as well as maintaining community with retirees. Phase 3 is focusing on partnerships to engage retirees again with the university.

Pat Dougherty, Director, University of Washington Retirement Relations, University of Washington Retirement Association.

University Advancement is anything related to advancing the mission of the university, and the role of retirees is part of advancing that mission. Neglecting retiree engagement is like leaving the field at the end of the third quarter. While associations for alumni, who are only at their alma mater for 4-5 years, have a long history, institutional programs and policies to engage
retirees, who may have 35-40 years with a university, are still in their infancy. RO's need to find an administrative home/champion on campus, sign a memorandum of understanding with the university, and survey the contributions by retirees to the university and community. Like Van Ummersen and Crouse, Dougherty reviewed the funding crisis and the resultant change in the structure of higher education, emphasizing that retirees have to adopt a marketing strategy with legislatures that underscores their value as well as the value of higher education as a whole. She likewise recommended addressing the tension between older and younger faculty (through career phases, mutual respect and support, etc.).

Education will look very different in 2030. Because of ageism, retirees' offer of their expertise and experience is not always welcome. If we are going to ask the institution for greater roles and responsibilities, we are going to need to model the role of the elder, nurturing the next generation with the university as our ally.

Dougherty pointed out that many of the people we (AROHE) need to be talking to—chancellors, presidents, deans, vice presidents, HR directors, other HR staff, Advancement or Development directors, other current administrators—were not present at the AROHE conference. What do attendees need from AROHE to start talking to these absent people?

In discussing the panel's presentations, attendees made the point that the concerns of AAUP and AROHE may overlap and that AAUP does a lot of work with Congress (taking up the Higher Education Act—the last one took eight years to pass) and has a strong research group that develops data on faculty. On the topic of scarce resources, it was observed that there may be more potential for funding from private sources. There was discussion of tax exempt status for RO's/consortia. State and regional consortia have more clout with legislatures than do individual RO's. RO's might look to the universities for legislative lobbyists and advocacy. And, of course, we may have had students who are now legislators.

One attendee, noting the tendency of conference speakers and session to dwell on potential problems and challenges, said that it was important to remember that the Spanish word for retirement was "jubilacion." The session was dismissed with a reminder to embrace the joy of entering the life phase called retirement.
[NOTE: There was one more hour-and-a-half session later that afternoon for feedback from concurrent sessions and further input, but because I was planning to meet a relative that evening in Olympia, I skipped the final session in order to get on the road.]

Conclusions/ Recommendations for TURFA

Forge a strong relationship with the TU Alumni Association, exploring mutual interests.

Propose to the administration a pilot program for a series of retirement talks/seminars, like those at UCLA, UC Davis, and UC Berkeley.

Get a TURFA member on the University Senate, ideally with voting privileges.

Extend "Coffee with . . ." beyond the president to other administrators and campus leaders.

Encourage other USM campuses to form their own faculty or faculty/staff retirement organizations.

Survey retirees to create a report of their contributions to the university and community; present it to the TU administration and use it as a basis for public recognition of outstanding retirees.

Begin a Living History (or Oral History) Project, recording interviews with retirees to archive and broadcast.

Assign specific roles to Executive Committee members who do not already have them (e.g., Alumni Association Liaison, Retirement Transition Pilot Program Director, etc.).

Investigate, with administrators, formal and informal ways to get retired faculty back on campus in teaching, research, and service roles.