

GA-HERO
Meeting held November 13, 2015
Middle Georgia State University, Macon, GA
Student Life Center - Foundation Board Room, 10 am - 2 pm

NOTES

Present: David Brasington (Georgia State University), Zandra Brasington (Georgia State University), John Bugge (Emory University), Missy Cody (Georgia State University), Bob DeLong (Valdosta State University), Dave Ewert (Georgia State University), Erica Hart (Georgia Perimeter College), John Hutcheson (Dalton State College), Clara Krug (Georgia Southern University), Dave Lapp (Georgia Regents University), Bob Lee (Valdosta State University), Dennis Marks (Valdosta State University), Bob McDonough (Georgia Perimeter College), Wanda McGukin (University of West Georgia), Barbara Morgan (Atlanta Metropolitan State College), Anne Page Mosby (Georgia State University), Carol Pope (Kennesaw State University), Anne Richards (University of West Georgia), Louis Schmier (Valdosta State University), Gretchen Schulz (Emory University), Mary Watson (Valdosta State University), Martha Wicker (Clayton State University), Pat Wilkins (Georgia College and State University, Darton College).

1. **Welcome.** Pat Wilkins welcomed the group at 10:15 a.m. She explained that she, Carol and Dave had been organizing this meeting since September. She explained that she is retired from Georgia College & State University and is currently working at Darton College. She thanked President Blake of Middle Georgia State University, who could not be in attendance at today's meeting, but sent a welcome to the group. The group expressed its appreciation through a round of applause for President Blake (for giving us the support needed, through the Conference Center, to hold our meeting on the MGSU campus, and for providing lunch in addition). Pat also announced that Darton College had given GA-HERO a generous donation which paid for the coffee provided at today's meeting and can also help with costs related to the GA-HERO website. Pat also thanked Carol Pope for providing home-made cake and said she would send notes of acknowledgment and thanks to those who had supported this meeting so graciously.

2. Dave Ewert noted that this was the **10th meeting of GA-HERO**, which was started in 2012. It was also the first time that the group had two sponsors for one of its meetings. He said it was good to meet fellow retirees, especially so many involved in the University System of Georgia Retiree Council (USGRC). He explained that, when it was founded, the purpose of GA-HERO was to develop viable and functional retiree organizations on the campuses of colleges and universities in the state of Georgia. Today's program, he explained, was designed to help attendees gain some insight about where they could get started if a retiree organization did not currently exist on their campus, and where existing retiree organizations might consider going next.

3. **Introductions.** Dave said that he had learned that, when introductions are made in Japan, it is thought rude to mention one's name before mentioning the name of the institution and the discipline with which one is associated. He asked persons to follow this tradition in introducing themselves at today's meeting. For example . . .

From Georgia State University, with a background in Finance, Dave Ewert.

From Georgia State University, having worked with the retiree Emeriti Association Board, especially with regard to its author series, Anne Page Mosby

From Clayton State University, President of the Clayton State Retiree Association and former Director of the Center for Instructional Development, Martha Wicker

From Georgia State University, Chair of the Emeriti Association, with a background in Food Science and Nutrition, Missy Cody

From Oxford at Emory University, Professor Emeritus of English and Interdisciplinary Studies, in her fifth year of retirement and a volunteer for lunch-time colloquia in her retiree association, Gretchen Schulz

From Valdosta State University, Past Director of an Environmental Health, Safety, and Service program, Bob DeLong

From Valdosta State University, "Pest in residence" in the History Department, Louie Schmier

From Valdosta State University, retired Police sergeant and outgoing Chair of the VSU retiree organization, Bob Lee

From Valdosta State University, Secretary/Treasurer of the VSU retiree organization and a person who worked formerly with grants and contracts and taught statistics at VSU, Mary Watson

From Valdosta State University, VSU's representative on the USGRC, Chair Elect of the USGRC, and a person with a background in Astrophysics, Dennis Marks

From Georgia Southern University, a former administrative assistant in Accounting in the College of Business, Zandra Brasington

From Georgia Southern University, a Professor Emerita in French who retired on June 1, 2015 and represents no retiree association at GSU, Clara Krug

From Georgia Perimeter College, the liaison for the retiree association and a Development Officer at GPC, Erica Hart

From Statesboro, husband and chauffeur of Zandra Brasington, David Brasington

From Georgia Perimeter College, second-term President of the GPC Retiree Association and former Professor Emeritus of Biology, Bob McDonough

From Dalton State College, retired VPAA who was asked about a month ago to serve on the USGRC, John Hutcheson

From Georgia Regents University, soon to be Augusta University, Emeritus Professor from the School of Medicine (Biology), Dave Lapp

From the University of West Georgia, former director of Career Services, and member of the UWG Association of Retired Faculty and Staff since 2012, and UWG's representative to the GA-HERO Board of Directors, Wanda McGukin

From the University of West Georgia, retiree from the Department of Psychology, UWG alternate representative to the USGRC, Anne Richards

From Georgia College and State University, former Budget Director, Assoc. VP Controller, with expertise in Finance and June 1, 2014 retiree from GCSU, Pat Wilkins

From Emory University, Chair of the Executive Committee of the Emeriti Association and retired from the English Department, John Bugge

From Kennesaw State University, former Director of Student Development, and now part-time worker in a paid position for the KSU retiree organization, and web master for GA-HERO, Carol Pope

From Atlanta Metropolitan State College, with Science Education background, Barbara Morgan.

4. Dave Ewert said the **meetings of GA-HERO** have always inspired him and given him renewed energy to go back and do something more innovative in his retiree organization at Georgia State University. He explained that GA-HERO is a network of college and university-based retiree organizations in the state of Georgia. It fosters the development and sharing of ideas, information, current research, advocacy, and **best practices** among its members. It endeavors to **create awareness** that campus-based retiree organizations are beneficial to both retirees and the campuses on which they are based. It works to create, research, disseminate (through teaching) and store information about retirees and retiree organizations. Dave also mentioned a service project he would like to see implemented - helping people write memoirs about their own professional lives and link these to the history of the schools in which they were employed.

He explained that **AROHE** is an organization that meets every other year, and provides information to assist retiree organizations in being recognized more fully and handling succession and management issues. It is also a group that discusses a wide range of activities retiree organizations might wish to pursue. It puts out an e-newsletter, offers a lot of advice and information free of charge, and provides more substantive mentoring and other benefits to its member institutions/organizations. Retiree organizations that belong to AROHE are official voting members of GA-HERO, although GA-HERO is not an official "chapter" of AROHE. Given the wealth of information it provides its members, Dave said he considered the cost of becoming a member of AROHE (\$10/month) to be well worth it. He said he has learned a lot from these meetings and thought each institution of higher education would find it worthwhile to pay for membership in the organization if it wanted to develop or sustain a retiree organization. A recent edition of the AROHE newsletter provided the following research findings:

Some 65% of tenured faculty plan to put off retirement.

16% say they would like to retire by the "normal" age of 67 but expect to work longer for financial reasons.

49% say they'd want to work past the age of 67 by choice.

For further information, see www.arohe.org.

GA-HERO Directors (representatives of institutions that are AROHE members)

Martha Wicker (Clayton)

Gretchen Schulz (Emory)

Bob McDonough (GPC)

Harry Dangel (GSU)

Dorothy Zinsmeister (KSU)

Wanda McGukin (UWG)

Fred Ware (VSU)

Officers:

President: Dave Ewert

Vice President/Treasurer: John Bugge

Secretary: Carol Pope

Dave thanked Carol for her contributions in getting this meeting together and for setting up and maintaining the website.

Dave distributed an agenda for today's meeting, entitled "The Birth and Development of Two Retiree Organizations: Learning from Our Experiences." It read as follows:

Introduction of Attendees - school, your academic area, your name and briefly one issue for your retiree organization, current or prospective.

Introduction - The Bigger Picture

Discussion Leaders: Anne Richards and Wanda McGukin, West Georgia; Dennis Marks, Valdosta State

Suggested specific topics plus what we found with the survey questions in our email announcing this meeting:

Who leads creation of an RO? Name of person(s). Administrators? Retirees? Faculty?
Senior Staff?

How do these leaders form an RO?

What is the mission?

Who governs? Bylaws?

Who is responsible for the RO? President/Provost/HR or Development.

What are good first (and additional) activities? What does it take? Who will do it?

How is RO funded? School? Donations/Contributions? Dues?

Does RO have an administrative assistant? Who pays for it?

Communication - Website? Newsletter? Email listserv?

How specifically will you measure your RO's effectiveness?

Who in GA-HERO will you call and email for help?

Other?

So far as Georgia State University's Emeriti Association is concerned, Dave explained that a distinguished professor came back after retirement to talk with the Associate Provost and told him that his experience of retirement could be summed up as follows: "I feel like I fell off a cliff." It didn't take long before the Associate Provost put the professor in touch with the Advancement and Development folks and the organization of the Emeriti Association came into being very easily after that. Someone has to pick things up and go with it, Dave noted. He, himself, belonged to the national organization, AROHE and found meaningful some of their programming on how to do financial planning for retirement.

John Bugge served as moderator for the portion of the program focusing on the birth and development of the retiree organizations at University of West Georgia and Valdosta State University. He said he was impressed with the view from the windows in the Conference Room where we were meeting, the elegance of the room itself, and the talent gathered around the table. He provided the following as background information about those about to make presentations to the group:

Anne Richards - one of the founding members of the Steering Committee of the Association of

Retired Faculty and Staff (ARFS) at UWG, long-time editor of the GA Conference of AAUP newsletter. [As an aside John mentioned he had headed the AAUP chapter at Emory in the past]. Former President of the UWG Chapter of the AAUP, and a person who has agreed to take notes at GA-HERO meetings.

Wanda McGukin - former Director of Career Services, UWG - who provided the essential service to students looking for jobs following their graduation. Member of the Friends of the Library and friend of a member of the Master Gardeners in Carrollton (her husband, Grant).

Dennis Marks - A person with background in Physics, Astrophysics, and Geosciences at VSU, Past President of the GA Conference of the AAUP, and Past President of the GA Academy of Science.

John also explained that his hope was that as Anne, Wanda and Dennis discussed the development of their organizations, and the lessons they learned along the way, others around the table would be active participants in the discussion, asking questions and volunteering their own ideas. In this way, we might learn more from all our colleagues about best practices.

Anne then shared a response to the first question asked:

Who leads the creation of an RO? Name of person(s). Administrators? Retirees? Faculty? Senior Staff?

She explained that she couldn't take notes on what she was saying extemporaneously, so was providing attendees with a written summary of her remarks that she would incorporate in the minutes.

WHAT LED TO THE CREATION OF THE RETIREMENT ORGANIZATION AT THE UNIVERSITY OF WEST GEORGIA?

The creation of the retirement organization established at UWG can be credited to one person's concerns about the ways in which retiring faculty and staff experienced the institution as they came to the end of their sometimes lengthy careers on campus. That person was Andy Leavitt, initially a faculty member in the Department of Chemistry, who was tenured and promoted at the university. He subsequently sought and secured a position as the Associate Vice President for Development and Alumni Relations before becoming the Associate Vice President for University Advancement at UWG and Executive Director of the West Georgia Foundation. In these latter positions, as he began talking with persons about supporting the university financially, Andy became aware that, when several employees left the university at the time of their retirement, they were not having a good experience. They harbored mistrust and hostility toward some university personnel, felt badly about how various things were being handled at the university, and griped about such practices as having to get an eleven-signature form signed by all parties before their last paycheck was issued. Many were wary of those working in Advancement and Development because they thought of them as primarily interested in soliciting financial contributions. Andy also learned that a number of staff had been mistreated by ineffective supervisors who themselves had limited expertise and little or no support regarding how to serve more effectively in their positions. At the time, the way the institution as a whole honored retirees was to invite them to the last General Faculty meeting of the

year, provide them with a corsage, ask them to stand as a group to be recognized in that meeting, and have them pose for a group photo in the lobby of the building where the meeting was held.

Once Andy's consciousness was raised with respect to how many retirees felt, he soon decided that something should be done about the treatment of retirees for a broader purpose than the prospects he might eventually have to turn to them for financial support for the institution. It troubled him that the only institutional recognition of retiring employees in existence at the time was rather impersonal in nature, and he considered it a shame that retirees weren't leaving the institution feeling greater pride and satisfaction about the years they'd given to the university. His father was an academic who felt positively about his years as a professor, and Andy hoped to make it possible for more UWG retirees to feel similarly.

He had been reading about retiree organizations around the country and thought something like this could be of mutual benefit to both retirees and the university. He came to believe that if retirees were more contented with how they were viewed as they left the university, they might be more inclined to stay connected to the university, give donations to various programs, and help the university out in other ways. To build trust and change the negative perceptions retirees seemed to have, Andy thought it important that a group of retirees be funded by the university and given a certain amount of control over activities that might appeal to them.

At some point in 2003, he spoke with a recently-retired former Assistant to the Dean in the College of Arts & Sciences and former professor in the Department of Mass Communications (Glenn Novak) about his concerns. And he asked if Glenn might be interested in helping to form some sort of membership organization based loosely on an affinity group for alumni that would honor faculty and staff beyond what was done at the Spring faculty meeting. While it wasn't his job to track down retirees, Andy said that, between the data bases in Development and Alumni Relations, and those in Human Resources, he thought it would be possible to locate the institution's retirees. He told Glenn that he wanted to provide retirees with a token gift and acknowledge their contributions in some substantive fashion in front of their peers. Glenn and his wife, Debbie, agreed to assist him in this project.

HOW DID THESE LEADERS FORM A RETIREMENT ORGANIZATION?

Andy proposed that the first step would be to assemble good, responsible people with ideas and the willingness to participate in this effort. In addition to his wife, Glenn came up with the names of four people: Clois Reese, Anne Richards, and Burdett and Shirley Wantland. Clois had been the secretary in the Dean's Office in Arts & Sciences and was then retired. Anne was a retired Professor from the Department of Psychology. Glenn's wife, Debbie, had worked in the Library on campus with Shirley Wantland, also a retiree, and Shirley's husband, Burdett, was a retired member of the faculty in the Department of English and Philosophy. Soon after that, Dotti Green, a member of the Development and Alumni Relations staff became involved in organizational meetings. At that time, there was no hurry to set up an initial event. This group of persons began meeting at the Alumni House on campus and invited others to join with them. They got the word out to fellow retirees who were known to be active in the community and on the campus. This included Tom Carrere (retired Professor of Educational Leadership), Jan Ruskell (retired faculty member in the Library), Carole Scott (retired professor from the Department of Economics), and Martha Ann

Saunders, (retired professor from the Department of English). Eventually, the group consisted of a retiree from the staff, and retirees from faculties in the College of Education, the College of Business, the College of Arts & Sciences, and the Library. It was harder to draw much support from retired staff because of cultural issues between faculty and staff at the time. UWG was more "faculty-centered" in those days as the Staff Council at UWG had no policy-making authority but the Faculty Senate routinely recommended revisions to policies and procedures.

Andy, who had credibility with retired faculty because he had been one of them in the recent past, also had access to discretionary funding as the Associate VP for University Advancement. "Crucial to its [the retiree organization's] existence," he reports, was that he funded the group directly from the Foundation. His theory in justifying this to the Board of Trustees of the Foundation was that a happy, healthy engaged retiree community will ultimately translate into support for the university. Many retirees were already donating to the institution and then VP for University Advancement, Tara Singer, approved of everything Andy wanted to do for them.

CLARA KRUG: One of our newer administrators has said that retirees don't contribute anything to our university - and his parents used to teach at GSU. He has no sense of the cash contributions retirees make, how their attendance at football games is significant, the memberships they hold on various college admission boards, etc.

GRETCHEN SCHULZ: I attended a meeting of AROHE. Learned there that all retirees need to do research to show what they are doing, how they are contributing to their institutions. A great argument can be made once that research is done. Many make monetary donations.

MARTHA WICKER: Our retiree organization asked an officer in our development office to clarify for us the amount contributed by retired faculty and staff to our institution. That office knows exactly how much retirees have given. The officer came to us to thank us for our contributions. Over time, this helped us have better services and support from our university.

GRETCHEN SCHULZ: On the issue of "How it all began" that a given retiree organization got started, I'd emphasize the importance of distinguished, and well-respected faculty. Retiree organizations typically don't begin in a top-down way. But a few who have pull at a given institution can be all it takes to get one going.

DENNIS MARKS: Things began changing at our institution in 1993, when a Faculty Senate was formed. Soon after that a Staff Association was created. And that group had luncheons where retiring staff were recognized. Human Resources also had a benefits fair, which retirees attended. Folks instrumental in founding the Faculty Senate thought it would be good to stay connected after that occurred. They were working with HR, not with the Development Office on campus. The Secretary/Treasurer of our retiree organization was the person in HR responsible for retirees. She herself had not yet retired.

It was most effective in our case to work with HR because we didn't want faculty to think that the only reason we were contacting them was so they would give money to the institution when they died.

So our plug-in is HR. But in setting up our bylaws, we created a group of 9 faculty who are elected for three-year terms. They, in turn, elect officers for cross appointments in an ex-officio capacity to the Faculty Senate and the Staff Council. And, the Senate and the Staff Council elect persons to serve in an ex-officio capacity in our retiree organization. So our retiree organization is built into the organizational structure of the university. We also have officials from our Development Office and HR as ex-officio representatives in our retiree organization.

BARBARA MORGAN: It is important to build in these structural connections. And at our institution, our group of retirees includes both faculty and staff.

LOUIE SCHMIER: I have a different perspective than Dennis does. I believe experience is a terrible thing to waste. I have been retired since December 2012. I retired angrily, and my retirement was forced after 46 years. I have been involved in our retiree association this past year. I was one of the ambassadors for the healthcare transition. I was never asked as a retiree: What can we do for you? When the institution was going through a decline in its student numbers, and we had our annual transition to a new administration, I sat down in the midst of my anger and wrote the Acting President and Provost. I asked them to consider that in order to better recruit and retain students, why not use retired faculty? At Homecoming, why not set up connections between retirees and alumni? I never got an answer. There is a disconnect between our association and the institution. I was "cut loose" and a lot of retirees feel this. We went through a silly retirement thing that was meant to acknowledge our retiring. Nothing was integrated into this about how we could use our experience for the betterment of the university. I've been elected to the USGRC. Dennis has asked us: What do you want from an association of retirees? What can we do for you? We typically think retirees want to know more about whether they have done sufficient financial preparation for retirement. When I retired, I was angry, but I was also scared about what my life after retirement would be. I've learned that I love my freedom, and not being engaged with administrative politics. I can be a family caretaker at a moment's notice if this is necessary. I can spoil my grandchildren on their schedule, and I can travel. We talked about a retiree newsletter having an article about the positive and negative aspects of retirement - the emotional and psychological aspects of retirement as well as the financial. But, until this day, the retiree association is not fully integrated into the institution. I've suggested that, at Homecoming, why not set up a forum where if people give so much, we'll give them a cup. Never got a word back. You have to have a retiree association integrated into the structure of the institution.

JOHN BUGGE: The administration of most institutions is ignorant of the whole idea of retirement. Being cut loose happens too much. The Administration should take responsibility for retirees both now and later. They have a steep learning curve. They never thought about what retirees need and could do for them. So any start-up retiree organization faces the task of educating the administration about what retirees can contribute. Baby boomers are retiring in greater numbers now. Administrations are facing more aging faculty and can't hire young persons to handle all the positions that have to be filled. A lot of retirees can do things that would save money, provide public relations support, make contact with alumni, etc. It's the retirees most alumni want to come back to campus to see - because they don't know the current faculty.

MARTHA WICKER: We had the reverse situation. Our athletic director contacted us to set up a retiree night. We've helped for several years. We've been present at Basketball night. Retirees are

on search committees, volunteer in the library. HR has contacted us for assistance with benefits fairs. So we are connected to our institution and have been for several years. As a result, when we went this year and asked our administration to pay for AROHE membership, they did so readily.

ANNE RICHARDS: Our retiree association was just asked to consider participating in the very sort of contact Louie described (above) - where alumni identify faculty they'd like to visit with when they come back on campus, and the retirees agree to attend an event where they can reconnect with these alums.

BARBARA MORGAN: I think it's important as a starting point that we begin with a needs assessment regarding what retirees want from a retiree organization. I don't want to just go to something meaningless. And it's important how they perceive themselves as having something to contribute.

MARTHA WICKER: We've conducted a needs assessment twice and have benefitted from the information we received.

LOUIE SCHMIER: We had the USG come to campus twice to talk about the transition to the AON healthcare exchange. This is where HR dropped the ball. Because of our involvement with the USGRC, VSU had two ambassadors. We could have been asked to help with the transition, but no one did this. When we had our enrollment meetings with the Benefits Advisors, Dennis and I were way ahead of the curve because we had such preparation for this as a result of our involvement with the USGRC. This was a great example of how a retirement organization could be helpful to the institution. We just have to think about these needs. As I see it, we're a service organization. So, what is it that retirees need and what do they want that we can help provide?

ZANDRA BRASINGTON: was your needs assessment survey done through HR?

MARTHA WICKER: We have a survey tool available on our campus. We got training to learn to use it. We fine tuned what we wanted it to address. And it prints out a nice report.

PAT WILKINS: Could you share that information?

MARTHA WICKER: Yes, although a lot of the questions we asked were specific to our campus.

JOHN BUGGE: Information about such surveys could be put on the GA-HERO website.

GRETCHEN SCHULZ: Surely some of the needs of retirees are related to the fear and feeling of falling off the cliff, or falling into a black hole. You can do a lot in retirement, but what you've lost are the ties with your colleagues. If there is not a retiree organization on your campus, you might make an effort to meet with some colleagues. But the great advantage of an organization is that it fills the need for collegial contact. And you can get in contact with even more people than you knew when teaching - a whole new set of colleagues. I'm famous for describing the experience of the Emeriti Association as providing retirees with an opportunity to stay in school forever, to continue to have intellectual exchanges and not just social or service opportunities.

ERICA HART: I'm at Georgia Perimeter College. Our Association began in 2009 with faculty and staff who thought it was a good idea. They went to HR at first with their idea, but HR sent them to Advancement. We said we could support such a group if they got it organized. A lot of people in our association are not on email, but they are very involved. They planned a social event. Retirees came out for the event who hadn't been on campus for as many as 40 years. If we send out a survey in paper form, it comes back, even if we don't provide a pre-stamped envelope. Email didn't work for our retirees. We didn't get responses. The retirees who organized our association elected a Board and now plan quarterly meetings. I'm happy to assist them. It's a way to bring people together who can help with orientation, etc. It's a good way to connect with retirees.

BOB McDONOUGH: We could not do what we do without Erica. She is the backbone of the organization at our institution. There were many retirees who left our institution with bitterness. We involve both staff and faculty in our retiree association. Everyone comes in on an equal basis. A lot of hard feelings have been done away with through holiday dinners, trips, and tours. We provide opportunities for fellowship and have a large number of faculty who have endowed scholarships. And we raised \$30,000 for a scholarship just from retirees alone. Our association is very closely tied in with our administration and we have had a very positive experience with our administrators.

ERICA HART: Our development officers track the source of all contributions. From a development perspective, it is known that retirees who have never given before are now giving to our retiree scholarship or to the General Fund. Our administration is excited about that.

JOHN BUGGE: This is gold-plated proof that administrators need to learn about. And any start-up organization can easily do the research needed and get such information to administrators. It would also be possible to create a document with two columns on it - one that would list retirees needs and the other institutional needs - and then brainstorm ways of matching retirees to institutional needs and vice versa.

Next major question: **HOW DID LEADERS FORM A RETIREE ORGANIZATION?**

DENNIS MARKS: I'm distributing two sets of bylaws. One for the USGRC and one for the Valdosta State University Retirees Association. [see attached]

As I see things, GA-HERO and the USGRC help each other in several ways. For those institutions in the USG, the USGRC has a more formal structure and is designed to have representation from retirees for each campus in the state system. I'm also going to distribute a roster of the membership of the USGRC. You may be a bit surprised to discover that not every institution currently has a representative, even though each is entitled to one. Each institution can have an official representative, and can also designate an alternate who has no voting privileges unless the primary representative is not there. The roster also lists the website for each retiree organization. [See pp. 11-13]. The representatives on the USGRC should come from the retiree community at each institution. When institutions are asked to provide representatives, the persons identified should come up from retirees. The USGRC has cross-representation to the USG Faculty Council and the USG Staff Council. We are currently trying to replicate this arrangement at VSU. We are formalizing the election of such individuals in our bylaws.

University System of Georgia Retiree Council Roster

Institution	USGRC Representative and email	USGRC Alternate and email	Retiree Web site
Abraham Baldwin Agricultural College	Patsy Hembree (R) pembree@abac.edu	None	None
Albany State University	Laverne Luster (R) laverneluster53@gmail.com	William Johnson (R) jhnsnwill8@aol.com	None
Armstrong State University	Dr. Sara Connor Sara.connor@armstrong.edu	None	None
Atlanta Metropolitan State College	Barbara Morgan (R) bmorgan@atlm.edu	None	None
Bainbridge State College	Ray Chambers (R) raychmbrs@hotmail.com	None	None
Clayton State University	Martha Wicker (R) MarthaWicker@clayton.edu	Carol Braun (R) carolbraun@clayton.edu	www.clayton.edu/csra
College of Coastal Georgia	Ann Crowther (R) crowther.ann@gmail.com	None	None
Columbus State University	None	None	None
Dalton State College	John Hutcheson (R) jhutcheson@daltonstate.edu	Sally Addis (R) sallykayaker@optilink.us	None
Darton State College	Pat Wilkins (R) pat.wilkins@darton.edu	None	None
East Georgia State College	John Derden (R) jderden@ega.edu	None	None

Institution	USGRC Representative and email	USGRC Alternate and email	Retiree Web site
Fort Valley State University	Tricia Addison addisont@fvsu.edu	None	None
Georgia College & State University	Pat Wilkins (R) pat.wilkins@gcsu.edu	None	None
Georgia Gwinnett College	Julie Weisberg (R) jweisber@ggc.edu	None	None
Georgia Highlands College	None	None	None
Georgia Institute of Technology	Andy Smith (R) anderson.smith@carnegie.gatech.edu	None	The Silver Jackets http://www.silverjackets.gatech.edu/
Georgia Perimeter College	Bob McDonough (R) Robert.McDonough@gpc.edu	None	
Georgia Regents University	David Lapp (R) dflapp@comcast.net	Libby Poteet (R) libbypoteet@comcast.net	http://www.gru.edu/retirees/
Georgia Southern University	Barbara Price (R) baprice@georgiasouthern.edu	None	None
Georgia Southwestern State University	Richard Baringer (R) r.baringer@yahoo.com	Brenda Davis (R) Brenda.Davis@gsw.edu	https://gsw.edu/resources/facultyandstaff/retiree-association/index
Georgia State University	Missy Cody (R) mcody@gsu.edu	Harry Dangel (R) hdangel@gsu.edu	http://emeriti.gsu.edu
Gordon State College	Jerry Turner (R) jerryt@gordonstate.edu	None	None
Kennesaw State University	Dorothy Zinsmeister(R) dzinsmei@kennesaw.edu	None	http://retirees.kennesaw.edu/

Institution	USGRC Representative and email	USGRC Alternate and email	Retiree Web site
Middle Georgia State University	Levy Youmans (R) levy.youmans@mga.edu	None	None
Savannah State University	None	None	None
South Georgia State College	None	None	None
University of Georgia	Brahm Verma (R) bverma@engr.uga.edu	Tom Lauth (R) tplauth@uga.edu	UGARA.uga.edu
University of North Georgia	Kathy Martin Kathy.martin@ung.edu	None	None
University of West Georgia	Glenn Novak (R) gnovak@westga.edu	Anne Richards (R) arichard@westga.edu	www.westga.edu/arfs
Valdosta State University	Dennis Marks, (R) dmarks@valdosta.edu	None	http://www.valdosta.edu/administration/retirees/
Board of Regents System Office	Linda Noble (R) Linda.noble@usg.edu	Mike Rogers (R) Michael.rogers@usg.edu	None

R=retiree

Dennis Marks, continuing

One thing GA-HERO can do is to help the USGRC establish retiree organizations on campuses where they don't currently exist. The USGRC has really good channels for talking directly with folks in the Central Office. Four of those working in the USG central office have regularly attended meetings of the USGRC. We have good interchanges and opportunities to provide feedback to those in the Central office at our meetings and outside the meetings. But we don't have vibrant retiree organizations on all campuses. What GA-HERO provides are mentors who can go to campuses and help retiree organizations get going. So I hope what comes out of meetings of GA-HERO are more ways to fill in the holes in this roster where there is not an active organization on a given campus. Retirees interested in creating retiree organizations need a resource where they can plug in to get assistance and this is something GA-HERO is in a great position to provide.

DAVE EWERT: This is the first meeting of GA-HERO outside of the metro Atlanta area. And we did this for the purpose of reaching out to others. We've discovered that people don't respond to emails. It's phone numbers we need to achieve things more effectively. I might call the Provost of a given institution first and ask for ways of getting in touch with retirees. The most nimble responses come from Advancement and Development offices. HR personnel feel overworked, especially at this time of year (during open enrollment). But we depend on HR to tell us who will retire. We have to get cooperation from HR offices. Barbara Price told me she knew someone at one of the schools in Savannah who was hoping to get a retiree organization started. Fred Ware helped those interested in doing this by using SKYPE to share his experience at VSU.

JOHN BUGGE: If members of the USG have administrations who know about the existence of the USGRC, it would seem they would want to have a retiree organization on campus. You'd think this would thus be easy to achieve in state institutions.

DENNIS MARKS: It's easy to get one person identified to serve as a Retiree Council member, but that doesn't necessarily mean the retiree community has become engaged. That's how GA-HERO can help. Membership on the USGRC should be retiree-driven.

CLARA KRUG: In the case of Georgia Southern, our current interim President and Provost asked Barbara Price to get the ball rolling. And she came to meetings of the USGRC. Vicki Hodges, from HR sent out information about what was happening.

DAVE EWERT: I don't believe the USGRC champions AROHE.

DENNIS MARKS: The USG is more focused on the state rather than the national level.

DAVE EWERT: I asked for information about the USGRC from the Board of Regents. Because whoever I was speaking with believed the Council and GA-HERO were in competition, I didn't get the phone numbers I was hoping to get. I don't know why there isn't a warmer reception from the USGRC. We can reach more schools than the USG can and can be of assistance to them in helping in the formation of retiree organizations.

JOHN BUGGE: I'd like to shift the conversation to **bylaws**. Can the ones developed at Valdosta and the University of West Georgia serve as templates for others?

DENNIS MARKS: Ours were "shamelessly purloined" from UGA. We used UGA as our template and made adjustments for the size of our institution. You can find ours on our website: <http://www.valdosta.edu/administration/retirees/>

ANNE RICHARDS: We also used the bylaws of other institutions as a guide [including Clayton State, Georgia State, and Kennesaw]. We began with the bylaws from the University of Southern California (USC), however, because we understood their retiree organization was one of the first created in the country (1949). Our bylaws are also available on our website (www.westga.edu/arfs). One of the ideas we took from USC led to the inclusion of a Standing Committee in our retiree organization focusing on the needs of widows/widowers/surviving partners of deceased faculty and staff. This is because we learned from the spouse of a faculty member how painful it was that, once a retiree died, the spouse was cut off from further communications from our university. Often, this was a person who had developed relationships with co-workers of the retiree and was accustomed to socializing with other university-connected folks. All that came to an abrupt halt once the retiree died, however. In addition, we learned that since donations to the university were usually credited in the name of the retiree, even the development office ceased contact with the surviving spouse when it came to subsequent solicitations for contributions or announcements about institutional events.

LOUIE SCHMIER: I am disturbed that the USG doesn't feel comfortable about connections between the USGRC and GA-HERO and experiences a sense of competition there.

DAVE EWERT: We're fairly new. I think this is a self-correcting problem.

LOUIE SCHMIER: I think we are both serving the needs of retirees.

DAVE EWERT: The USGRC can advocate directly for retirees in relation to the USG. And we can do well things like assisting in the formation of retiree organizations.

BOB McDONOUGH: GA-HERO has both private and BOR schools associated with it, so it has a much wider scope. I believe GA-HERO should recruit more non-BOR schools to be a part of its gatherings. Agnes Scott, for example, has a distinguished faculty and staff, but still has no retiree organization.

Next Issue: WHAT IS THE MISSION of your RETIREE ORGANIZATION?

ANNE RICHARDS:

WHAT IS THE MISSION OF THE UWG RETIREE ORGANIZATION?

At the outset, Glenn insisted on some ground rules for the way the group would function:

(1) The organization would not be about money. There would be no fund-raising component to the group.

(2) There would be no formal structure to the organization - so it wouldn't look like a "committee," which many retirees were ready to leave behind.

Following Andy's initial vision, early meetings focused on ways retirees might be honored more substantially as they left the university. Andy and the group met with Henry Setter, a professor in the Art Department, who designed a medallion that was a work of art. It was based on the iconic symbol of the university at the time, which was a flame. After it was created, Andy bought 500 of them so they could be given out over a long period of time. He also had the idea of personalizing them by engraving them on the back with the person's name, department, and years of service. He considered this a "substantial heirloom memento." And it was only given to retirees and no one else. [Medallion was displayed to the group.]

Andy also envisioned giving these out at a special event held to honor retirees - an event where retirees and their families would be invited to hear someone say something nice about them, and food and drink (including alcoholic beverages) would be provided free of charge.

Thus the original mission of this fledgling organization was to devise ways to honor faculty and staff retirees at a special event held once a year on the campus.

In discussing how such an event might be structured, it soon became evident that having persons stand up to speak about each retiree would likely make for an uncomfortably long evening, while not providing sufficient time for the socializing that the group wanted to foster and attendees would likely enjoy. That led to the development of the idea to create a commemorative "Tribute Booklet." Both Glenn and Andy recall this was Anne Richards' idea at the time, but others readily agreed to it. Anne agreed to do the work of collecting "tribute statements" about retirees, and Martha Ann Saunders agreed to serve as editor of the pieces that were submitted. Andy agreed to pay for the booklet. And because of his generosity, the early versions of this booklet had color images on the cover and no limit on the number of pages inside. [Anne distributed sample copies of this booklet to meeting attendees.]

In order to implement the idea of organizing the event itself, Andy pulled in other staff from the Development and Alumni Relations office on campus - including Frank Pritchett (Director of Alumni Relations and Associate Director of Annual Giving). The group decided on a name for itself: the Association of Retired Faculty and Staff (ARFS) of the University of West Georgia.

Some ten years later, when bylaws of the group were adopted in September of 2014, the stated purposes of the organization were described in broader terms, i.e., to

- a. promote the well-being of its members;
- b. support the University of West Georgia retiree community;
- c. foster continued involvement of retirees in the mission of the university;
- d. facilitate communication between the university and its retirees;
- e. seek to promote the scholarly, social, and cultural interests of the retiree community;
- f. address matters related to benefits and resources for retirees.

WANDA McGUKIN: Wanda distributed and discussed the material outlined below.

UWG ARFS Organization

❖ **Annual Reunion**

- Lunch and program held at local country club
- Honors faculty & staff retired during past academic year
- 1st reunion held in 2004
- Avg attendance = 92
- Commemorative bronze medallion presented to each new retiree
- Program tribute to retirees

❖ **Retiree Legacy Scholarship Fund**

- Established Aug 2014
- Need to raise \$25,000 (within 5 years) before any scholarships awarded, then will award 5% of earnings each year
- \$12,775 collected as of October 2015
- Benefit deserving Georgia students who are retired or direct descendants of or an immediate family relation of retired faculty or staff
- Will be awarded annually, selection made by the General Scholarship Committee

❖ **Monthly Third Thursday Travel Program**

- Held at community library in Carrollton
- 3rd Thursday each month
- Hour long presentation (photos & commentary), then go to local restaurant for lunch

❖ **Email list serv**

- Notify and promote events
- Retiree meetings
- Notices, information such as insurance changes, deaths, other special interest info

❖ **Website**

- <http://www.westga.edu/arfs>

❖ **Newsletter**

- ***Rejuvenator*** – Quarterly publication keeps retirees informed of meetings, special events, and other timely items.

❖ **Support & Interactions with campus departments**

- Alumni Relations
 - Administrative and financial support
 - Dave Fraboni, Vice President for University Advancement
 - Frank Pritchett, Director of Alumni Relations
 - Meredith Ledbetter, Assistant Director of Alumni Relations
 - Kevin Hemphill, Coordinator of Alumni Relations (and the keeper of the website)
- Communications & Marketing
- Publications and Printing
- Human Resources
- McEvers Engraving
- Sunset Hills Country Club

❖ **Other benefits of membership**

- University bookstore discounts
- Special parking permit for F/S parking on campus
- UWG Theatre Company shows
- University Recreation Membership
- Use of Campus Library

❖ **Plans**

- Day trips (Gibbs Garden, museums, theater in Atlanta)
- Social gatherings

❖ **Challenges**

- Contacting retirees

Friday, November 13, 2015

She explained that our name is the Association of Retired Faculty and Staff or ARFS. The first event we planned, and have continued to organize every year is the annual reunion that honors new retirees. Our planning for this takes place all year long. Invitations go out over email and by a card sent in the mail [Wanda displayed an example of one of our invitations] to let people know the time and place of our event and to identify retirees being honored. In addition to the tributes for retirees in this booklet, we also have an "In Memoriam" section for retirees lost during the year.

DENNIS MARKS: That is very important to acknowledge.

WANDA McGUKIN: The average attendance at our annual reunion/reception is 92. Last year, our 10th year, we had 150 in attendance. That was a great turnout. Each year, the retirees receiving medallions are called up to the front of the room. The medallion is engraved with the name of the retiree, the department in which he/she was employed, and the person's years of service.

We just started a retiree legacy scholarship fund last year. We are expected to raise \$25,000 in 5 years to be able to award it. Currently we are over half way there. The scholarship can be awarded to retirees or family members of retirees and is based on GPA and need.

The third Thursday of each month we have organized travel programs. We are given space in our community library, which is especially convenient in terms of parking. A member of the retired faculty or staff puts together a slide presentation about a place he or she has traveled. Sometimes the presenter may be connected to the retiree in some way. This is a well-attended program, attracting about 25-40 people each month. It begins at 11 am and afterwards attendees can go out to eat together and socialize.

We have a quarterly newsletter which is distributed by email and also mailed out. It's a great way to let folks know what's going on and highlight different events.

Getting in touch with people is so hard. We want to save trees and do as much as we can electronically, but not all our retirees are using computers. We do have an email listserv to notify retirees and have used it a lot to send out information about the health-care transition. We also have a website. But we do some mailings through the postal service as well. We get information about who is retiring through a form filled out at Human Resources which is shared with Anne. That is how we start putting material together for the tribute booklet. We continue to struggle with how best to reach out to people. With regard to the insurance changes coming up, we worry that there are still some who don't know about this big change. We need to include something additional on the form coming to us from HR that asks "How would you like to be contacted by the Association for Retired Faculty and Staff in the future?" - email, snail mail, robo calls, whatever. We've learned that some retirees are giving up their land lines, and it's been difficult to get in touch with some of them.

All UWG retirees get parking passes free of charge. We get discounts at our bookstore, discounts to attend Theatre Company shows. We can join as members to use the University Recreation Center facilities. And we can use the campus Library.

We could not do any of the above without the support of the Alumni Office, which falls under University Advancement on our campus. We stole Dave Fraboni from Georgia State. He is our new Vice President for University Advancement and seems to be a great supporter of the retiree organization. Frank Pritchett is the Director of Alumni Relations, Meredith Ledbetter is the Associate Director of Alumni Relations. She has attended prior GA-HERO meetings. Kevin Hemphill is the keeper of our website. He does a really good job. All three (Frank, Meredith and Kevin) are graduates of UWG. So they have the buy-in for us too. We are also assisted by our University Communications and Marketing division, Publications and Printing on campus, and HR. And we have support from the community as well. The Sunset Hills Country club, located not far from the campus, now hosts our annual reunion. They are working with us tremendously to keep costs down and provide a nice event. At our most recent event, one of the retirees mentioned that the event was "the highlight of her career" at the university. McEver's Awards and Trophies, a local business, does the engraving on the medallions distributed to retirees.

So far as future plans are concerned, we are looking to expand what we offer retirees to include some day trips. We understand that our colleagues at Clayton State and Kennesaw have gone on shared trips. And perhaps we will look into joining them.

Our biggest challenge has been contacting retirees.

LOUIE SCHMIER: I have a son aged 39. He has a landline and email. But if I attempt to contact him on either, I might not hear back right away. If I text him, however, I get a response within 5 minutes. Sometimes a group text will get to some of your retirees immediately.

JOHN BUGGE: The group at UWG seems to have so many costs associated with the things you do. How do you handle those?

WANDA MCGUKIN: The administration pays for this. We have had some times when there were budget cuts and once were told that we would have to begin charging for persons attending our annual reception/reunion (with the exception of the person being honored).

ANNE RICHARDS: This is a matter regarding which we owe GA-HERO a big debt of gratitude. This is addressed in the last portion of the handout I distributed today [see following section].

WHO IS RESPONSIBLE FOR THE RETIREMENT ORGANIZATION?

Andy Leavitt eventually left the University of West Georgia. He had aspirations of becoming the president of an institution of higher education at some point, and succeeded in achieving that goal. He is presently the Chancellor of the University of Wisconsin at Oshkosh. He held the "power of the purse" for our retiree organization for several years, but also turned a significant measure of control over to the retirees who served as the "Steering Committee" for all of the group's activities.

After Andy left UWG, persons who served in leadership positions in University Advancement continued to support the retiree organization's activities financially. When the recession hit, cost-cutting measures led to some changes: The medallions were paid for, so they were still distributed.

The Tribute Book was still created, but each retiree's write-up was limited to one page and the entire booklet (including the cover) was printed in black and white. The menu for food and drink at the annual reception was considerably reduced.

Those involved in this group of retirees remained loyal to its original mission and continued to plan an annual reception for those recently retired. They also had the invaluable and seemingly tireless assistance of Dotti Green, Frank Pritchett, Dale Duffey and eventually Meredith Ledbetter and Kevin Hemphill of the offices of Alumni Relations, Advancement, and Development. Around 2010 or 2011 Glenn and Debbie Novak learned (through Frank Pritchett) of the existence of other retiree organizations in the state, principally the retiree organization at Kennesaw State University. Meetings were arranged where retirees from Kennesaw and those from UWG talked about what their respective organizations were doing, what their institutional resources were, and how they were constituted.

The UWG group learned that Kennesaw charged retirees dues for membership in their retiree organization, and, in turn, their retirees were given parking passes to enable them to park on campus. At UWG, retirees were given parking passes free of charge and, because of the generous funding provided by Andy and subsequent administrators who held positions of authority in Advancement and Development, there seemed no reason to charge dues for membership. Instead, any retiree who expressed a willingness to become a part of the UWG retiree organization was considered a member.

In January, 2012, Dave Ewert of Georgia State University and John Bugge of Emory University began organizing meetings of a group in the state that eventually became known as GA-HERO (standing for GA Higher Education Retiree Organizations). At the GA-HERO meetings, persons active in the UWG retiree association learned of a national organization known as AROHE (Assoc. of Retired Organizations in Higher Education). To become an official voting member of GA-HERO, a group had to become a member of AROHE, and, once a member of AROHE, our informal group on the UWG campus moved toward becoming a more formal entity. We learned a lot through our association with GA-HERO, including the fact that our retiree organization was dedicated to the inclusion of both faculty and staff, while other institutions brought retiree organizations into being that were open to faculty only, or emeriti faculty only.

Around 2013, at the encouragement of Frank Pritchett, the Steering Committee for the UWG retiree group began working on the creation of bylaws and, by 2014, organized the first "business meeting" of the ARFS group (at the annual reception/reunion) to have these considered for adoption. They were adopted, and this in turn led to an official election of officers of the organization in Fall, 2015. These officers now have responsibility for the retiree organization on the UWG campus, thankfully with the continued assistance and support of, Alumni Relations, Development, and Advancement personnel at the university.

For a brief period of time in 2014, after 10 years of a Camelot-like existence, the group hit its first roadblock. The person serving as the VP for University Advancement decided that the ARFS group should assume responsibility for financing its activities, except for publication and mailing of related printed materials that had the name of the university on them. This would have required ARFS, for the first time in its history, to charge a fee for attendance at its annual reception. And

this unsettling news arrived during the same year the University System of Georgia announced that retirees were no longer going to be carried on the USG healthcare plan with the defined benefits they had enjoyed in the past, but (beginning in 2016) would be outsourced to a private healthcare exchange. The USG planned to provide a defined contribution to defray the costs of the purchase of healthcare, but the amount of this contribution was not made public until mid-August of 2015. Thus, retirees were still reeling from the uncertainties associated with this change when the ARFS group was told the university would no longer pay for the events it had supported in the past.

Fortunately, thanks to a brainstorming session about our dilemma at a meeting of GA-HERO, and the fact that the VP who made this decision did not remain VP for long after his pronouncement, this was a short-lived problem for our organization. Beyond the wildest imaginations of Steering Committee members, a new VP for University Advancement (Dave Fraboni) was hired, whom ARFS Steering Committee members had heard glowing accounts about through GA-HERO. And, thankfully, Mr. Fraboni shared Andy Leavitt's foundational opinion about the significance of supporting the retiree group on campus. As a result, as of this report, the costs for the reception/reunion for retirees continue to be paid for by University or Foundation resources.

MARTHA WICKER: Do you charge dues for your retiree organization?

ANNE: No. We've been very fortunate thus far and have not had a need to do so.

DENNIS MARKS: We charge \$10/year at Valdosta State University/ \$100 for a life membership. Most prefer to pay for the life membership so they don't have to deal with dues more than once.

JOHN BUGGE: At Emory, we began with dues of \$25/year. Then at some point we upped it to \$50. We just weren't comfortable with that after awhile, and began simply asking persons who were so inclined to make a contribution. People are more than willing to write a check for \$100 or more because of the luncheon colloquia we organize twice each month. People see the value of this and want to pay something back to the organization for providing this.

GRETCHEN SHULZ: We ask people to pay for their lunches at these colloquia. But it doesn't cost much for what we do. We pay no honoraria. People at the university are happy to come to make presentations or be involved. We have space on campus with nearby parking. At our interdisciplinary seminars there are no costs except for coffee cups. I'm interested in knowing what staff others have. We have someone who works half-time. Otherwise all those organizing and carrying out our events are volunteers.

DAVE LAPP: At GRU our retiree organization costs \$10/year. We have prepared a letter which we leave at the HR department. When people retire they are given this letter. It tells them what the association is and that we forgive them their dues for the first year. After that, we hope they will be willing to pay dues because they see the value of what we offer them.

SOMEONE SAID that Valdosta State University also forgives dues the first year.

DAVE LAPP: My department always gave a program for those who were retiring. That was the most meaningful for me. It was likely because I enjoyed working in my department. We enjoyed

each other. In our school as in the sciences in general, you have to pay part of your salary through research grant funding. If you could do that, you could stay until you died and do research. The university appreciated our doing this. We had graduate students we educated and involved with our programs. This was before we merged with Augusta State. I don't have a feel for what happened for retirees from Augusta State.

PAT WILKINS: The USG folks are involved in several consolidations. Darton will soon be consolidated with Albany State University. Do you intend on keeping separate retiree organizations for Augusta State and what was Georgia Health Sciences, or have you looked into combining your groups?

BOB McDONOUGH: We are in the midst of consolidation with Georgia State University. We will keep our association separate but will welcome members from Georgia State. Georgia State has an Emeritus only Association. The association at Georgia Perimeter College has both faculty and staff. Our finances will remain separate for the first five years. Emeriti faculty can join our association if they wish to do so.

CAROL POPE: We have a very active retiree organization at Kennesaw. The one at Southern Polytechnic was unorganized and primarily socially-oriented. They went to lunch together about once a month. For the most part, they don't want to merge with us, but some see the benefit and might become involved with our organization. We were told that it's all KSU now.

DENNIS MARKS: We have a number of retirees in the VSU retiree organization from other institutions and they are very active. They can't be officers, but they can be involved.

ANNE RICHARDS: Our retiree organization created a category of membership called Associate Members. This came about because we came to know a person named Joe Cook, who moved from Florida to Georgia after having had a career as a faculty member. He told us how much he missed the contact with others in higher education so I invited him to a GA-HERO meeting. Some of you may remember him because he came to the GA-HERO meeting that was held at the Georgia Archives. He chose to spend more time with the Kennesaw retiree association after that, but we at UWG decided we wanted our retiree organization to be able to include persons who might have worked in another state, but retired in Georgia.

ERICA HART: And do you include the spouses of retirees also?

ANNE RICHARDS: Yes. We are also in the process of revising our bylaws in other ways to be more inclusive of persons who might want to be a part of our retiree organization. But I'm not yet sure what we will decide about this.

JOHN BUGGE: I'm going to ask you before long to share with others something you learned today and, if you have a retiree organization, something you did wrong, or thought was a mistake along the way. Now, however, I'd like to ask you about other activities retiree organizations are involved in that might not have been mentioned as yet.

LOUIE SCHMIER: The idea of this organization developing a travel bureau came to me. I am approaching the celebration of a 50th wedding anniversary. Perhaps we could brainstorm with this organization the possibility of creating travel packages. This would give us visibility also.

WANDA McGUKIN: Our Alumni Relations division is currently coordinating travel programs. And they are open to anybody who would like to make the trip. We could all make information like this available to one another on the GA-HERO website. If several organizations are planning trips, there would then be options for individual retirees.

CAROL POPE: I want to take a group photo before anyone leaves today.

ANNE PAGE MOSBY: I have been most interested in the Author Series at Georgia State. Emory has something similar in its colloquium series. I'm Emerita from the library so this is neutral in terms of a departmental focus. But I was the liaison to the Social Sciences and started there when it came to finding presenters for the colloquia. We've been trying to identify the published work of Georgia State faculty - retired and active. That would be of interest to retirees. Four times a year we invite faculty members from the community in general to talk about a recently published book. It is very rewarding and fascinating to learn of active scholarship.

JOHN BUGGE: How do you manage to bring people back to downtown?

ANNE PAGE MOSBY: That involves a lot of work. They do have free parking so that helps. Program attendance has been around 20-35 people. I have been able to arrange to host them in the library where retirees can check things out.

GRETCHEN SCHULZ: Our luncheon colloquium takes place on the first and third Mondays of each month. It's wonderful. Primarily for our Emeriti group this is something comparably easy to do. We offer a buffet lunch, which participants pay for. Access to and parking is easy. About 25-30 attended initially but about 40-50 attend now. It's a volunteer operation. We choose a good speaker, have a mix of male/female speakers, disciplines, administrators and faculty, active and retired individuals. Sometimes we have music as well. It's been terrifically successful. We even began live webcasts this summer and can send questions in and archive these on our website. It's easy and cheap to do. I've written up how we go about organizing the program if anyone is interested in a copy.

LOUIS SCHMIER: I'm flanked at this meeting by two knowledgeable people who are not authors. They have a tremendous amount of expertise and experience in their fields. Until we got distracted by the AON stuff I hadn't thought about other programs. But I think we can arrange colloquia that are not limited to authors by drawing on the experience of our retirees.

MARTHA WICKER: At Clayton State we have several clubs. We have a Book Club for Fiction and one for Non-Fiction. We have a Movie Club - retirees go downtown to see a film and eat lunch afterwards. Sometimes they discuss the movie they have just seen together. We have a Breakfast Club that meets monthly. We learned of retirees' interest in this due to our needs assessment. When we celebrated our 10th anniversary, we created a Legacy Project. We put in a butterfly garden on CSU's campus. Many of our retirees are Master Gardeners. We did this in conjunction with

Landscaping on the Clayton campus. This has engaged the interest of others since it was installed. The Biology faculty, for example, now have students doing research in the garden.

DAVE EWERT: When our organization got started at Georgia State, we asked charter members to each pay \$1,000 to join. There were 60 of us who were charter members, which got us off to a great start. That caught the attention of our Provost. A number of those gifts, but not all, are from people we see on a regular basis.

JOHN BUGGE: When we began our retiree organization at Emory, 100 people gave \$100 each. Their names were put on a plaque. That was a good beginning. It made the administration aware that we were serious about forming this group.

BOB LEE: In our retiree organization at Valdosta State, we have people share what they are doing in retirement. We do this once a month.

DENNIS MARKS: And we call the program "All About You."

GRETCHEN SCHULZ: We owe thanks to John Bugge for introducing the interdisciplinary seminar. We are in our 4th such seminar now. We've focused on such things as the nature of evidence, causes in the university or in the United States, the book *SAPIENS: A Brief History of Humankind* (2015) by Yuval Noah Harari. We had a wonderful discussion among people we didn't know before and it cost us almost nothing to organize.

MISSY CODY: One of the roles of our organization is to help reorient people to the university. Our physical plant changes constantly. We want retirees to feel at home on campus. We've had the library show us how to use its new systems. We've taken a tour of the new science building and labs to see what we can or don't do there. We think if we bring retirees in like this they won't feel left out about new developments on campus. We've had a program on the economy at the new law school building. We want to make sure retirees are comfortable coming back on their campus. And we report some of this in our newsletter. I also want to add that Dave Fraboni once looked up the donation records for our Emeriti. He does feel strongly about supporting retirees. He discovered we had contributed about \$9 million to Georgia State. That number has made a big difference to our Provost in terms of supporting our retiree organization.

JOHN BUGGE: At Emory, the retiree organization has taken on an advocacy role. Once one of our professors retired, she no longer had access to the software she needed. We persuaded the university to make an exception so she could get access to this software to continue her research. We've also sought to get the help of our IT staff if something goes on the blink with a retiree's computer. Actively employed faculty have access to such support staff, but retirees typically do not. When we went through the transition to the new health insurance system for retirees, this was a big change. There was a lot of fear and trepidation. Doctors in our group wrote up a wonderful memo that explained things to our retirees.

DAVID LAPP (?): On our campus retirees have gotten technical help on cybersecurity regarding their phones and email from those on campus with this expertise.

CAROL POPE: This is true at Kennesaw as well. And it's a big help. It's far better to do a job of prevention than try to fix things once they go awry.

REPORT from DENNIS MARKS on GA-HERO and USGRC

GA-HERO is an association of retiree organizations.

USGRC is a council made up of retirees plugged into the Board of Regents.

These organizations have complimentary purposes. It's important for retirees on the USGRC council to share information with each other, and the same is true of those in retiree organizations. The USGRC met in this same room three weeks ago. Marion Fedrick, the VP for Human Resources at the USG was present. She gave a reprise of the presentation she made to the Board of Regents in August about the changes in healthcare for the USG in 2016. She focused at the USGRC meeting on those parts of the presentation having to do with retirees. It helped clarify issues. Karin Elliott was also present at this meeting. She serves on the Total Rewards Steering Committee (TRSC). She and Dorothy Zinsmeister are actually attending the meeting of the TRSC today, and that is why Dorothy is not with us. I suspect we will get further clarification of matters of consequence to us following that meeting. I think it's very important that retirees are able through such organizations to reach out to keep retirees in the loop, funnel questions to HR, or to the System office, so retirees are not out there adrift. I think this will strengthen our retiree organizations. They will come to see the advantage of retiree organizations. This is a golden opportunity for retiree organizations and for GA-HERO to assist organizations in forming where they don't exist and to strengthen those that do exist.

We had a working lunch at the USGRC meeting and also had a report from the Communications Committee. This has gone out to the representatives of USG institutions who are listed on the handout provided (see pp. 11-13 above). This will be our top agenda item for the USGRC meeting to take place in the Spring. The Committee report focused on two things:

(1) **the need to enhance communication.** We discovered with the AON rollout that on some campuses retirees were very well-informed and on other campuses they were in total darkness. The USG HR folks were truly surprised to learn this also. The Communications Committee focused on the need for getting a listserv established for retirees on each campus. To begin the process we got a list of emails from our HR office. In some cases we found we had better information about retiree emails than HR did. Now information goes out on our listserv to all retirees, whether they are a member of our organization or not. It is very important to get information out to retirees. Not every institution has a retiree listserv, however.

Another thing this committee recommended was compiling a listserv of listservs so that authoritative information from the Central Office could be immediately and directly sent out to retirees. This would avoid problems of rumor, misinformation, and confusion that we have seen occur and will be very helpful.

We also talked about making the websites of each campus institution more retiree-friendly. When a person goes on a campus website currently, it is easy to see something for students and faculty on those websites. We wanted something to be prominently visible for retirees also. Also, the HR offices should have a good retiree benefits page with information easily accessible for retirees on it.

And we want to encourage retiree organizations to make the most use of other means of communications, such as telephone trees, texting, Facebook. These are things your retiree organization can do on your campus.

The Communications Committee report is in the form of a proposal thus far. No decision has been made about it as yet. Another one of its recommendations has to do with the forming of retiree councils on campuses. There are a handful of retiree associations in Georgia at the present time. We really need better communication among ourselves. These associations are varied in nature. Some are made up of emeriti faculty, some (such as the one at Valdosta State University) include both retired faculty and staff. The Retiree Council is a more formal structure which is in direct contact with the University System of Georgia. It includes ex-officio representation from the current USG Faculty Council and USG Staff Council. Communications from this Council go directly to retirees, which is a very effective means of communication with them. Council members can take their concerns to the System office.

(2) We are also recommending that a Retiree Council be established on each campus which is recognized as a part of the institution in the same way as a Faculty Senate or a Staff Council is now recognized. Existing retiree organizations can provide persons who might serve on such a council at their institution. What we see is the need for retirees to be formally recognized as part of the institution. Currently when communications go out from the President of an institution, for example, they go to Students, Faculty, and Staff. We'd like to see them go out to Students, Faculty, Staff, and Retirees so we don't have the sense of falling off the edge of the earth or going into a black hole once we retire.

The creation of a retiree council on each campus is something we can do to raise the level of recognition of retirees in institutions. A number of you have done excellent jobs in terms of tapping into administrations and having them see the value of retirees. But I think it falls on us to see that more occurs along these lines around the state. I hope you can make that vision a reality on your campus.

JOHN BUGGE: One of the most revolutionary ideas in what you said is the idea that you retire from a department or school to another part of the institution - the retiree organization. And to the extent it's flourishing or doing well, that organization will become recognized over time as another unit of the university, another part to which you retire. It's an interdisciplinary college of sorts where you then belong. This is a great aspirational idea.

This is a good time to share with others something you learned today.

I'll start off by saying that I knew about USC's retiree organization being one of the first in the country to exist, but I was not aware of their program recognizing the spouses of deceased faculty. This is something at Emory we have completely neglected. I would like to do something about this at Emory. Too many spouses are unfortunately left alone. They need to be more integrated into our group.

MARY PAGE MOSBY: I'm reminded of the variety of organizational arrangements at different institutions, and of the power of an institution to examine inclusiveness.

MARTHA WICKER: I've written down two things in a "must do" category when I get back to campus: Get a retiree member on both the Faculty Senate and Staff Council, and recognize retirees who passed away. We have a sunshine committee that gives donations to charity when people die. But we don't formally recognize those who've passed away. We do try to open our membership to spouses of deceased retirees, however.

MISSY CODY: I like opening connections between alumni and retirees. If you're building life-long connections to your university, this helps.

GRETCHEN SCHULZ: I was struck by something Dennis had to say - the need to have institutional websites to be more retiree-friendly - so something about retirees would popup on the home page. I've thought of the Emeritus website being user-friendly, but not the institutional website.

LOUIE SCHMIER: I was struck by the whole tenor of this meeting. There is so much for each of us to learn about how much we can contribute to the viability of our institutions and the learning curve the administration has to go through to tap the contributions retirees can make. Now I'd like to brainstorm with many of you further.

BOB LEE: As outgoing chair of the VSU retiree organization, I'm tempted to say our organization does everything perfectly. But I've heard some ways of reaching out to people here. We became aware of people we haven't reached. We have a fear we aren't getting information out about the upcoming healthcare changes to everyone. We've tried to reach them all, but realize it's not going to happen 100%. We should take this away from this meeting: We're here because we care and want to do the best.

MARY WATSON: I liked and never thought about (1) The breakfast club idea. This seems a really nice idea. A lot of older guys do this - why not us? (2) Contributing something of value to the institution, such as a butterfly garden. Iowa State has a rose garden. Why not a garden of another type?

DENNIS MARKS: Each of us comes away with new ideas of what we can do on our campuses. That's important for GA-HERO, our institutions, and the state of Georgia.

ZANDA BRASINGTON: I've appreciated listening to many thoughts and ideas exchanged here. The main thing for me is making administrators aware of the value of our retirees.

CLARA KRUG: Zanda and I will be working together and get back to that VP who said retirees didn't contribute.

BARBARA MORGAN: This has been a very informative session for me. I have a very long list of what to do and questions to ask. Of value for me is the issue of communicating more effectively with retirees. I've called retirees who happen to be living outside the state of Georgia and they had no idea of what was going on. Our communication systems are not what they should be and sometimes they don't exist at all. Retiree organizations are addressing the needs and concerns of the

retirees. One question I'd ask is "To what extent and in what ways should retirees be involved in institutional affairs once they are retired?" This is a major challenge for those representing other retirees on the type of council proposed.

BOB McDONOUGH: I leave here seeing reasons for mentoring faculty getting ready to retire. Our HR folks don't help retirees much in exit interviews to deal with what life as a retiree might be like. It would help a lot if we did more of this through our retiree organization.

JOHN HUTCHESON: Like Louie, I'm struck with the tenor of the meeting. At Dalton, we have an administration with sensitivity to what retirees can achieve. I would like to do a needs assessment to determine what the college can do for retirees and vice versa.

DAVE LAPP: I'm amazed at the differences in the programs people talked about. Our association has to do something to make it valuable to the college. Scholarship and Landscaping ideas appealed to me. Also, talking about the link on HR websites.

WANDA McGUKIN: Programming and needs assessment were significant ideas for me. We are all in this together and here to help each other. I would feel comfortable approaching any one in this room if I had issues or concerns I wanted to discuss.

ANNE RICHARDS: When the report of the Communications Committee came out and I shared it with our retirees, some thought it was a problem that nearly all the communications mentioned were through listservs or other electronic means that required the use of a computer. We've learned through the process of answering retiree questions about the healthcare transition that some don't use computers at all, and some who are computer literate have long periods of time when they don't have use of a computer because theirs has fallen into disrepair and they haven't been able to get it fixed. When we were employed, and something went wrong with our computers, someone from IT could be called to remedy the situation quickly. It's a lot harder in retirement for some to get a computer up and running again. As a result, I was struck by John's comment that at Emory they were advocating for IT personnel to be able to work on the computers of retirees. That would be a great help to many retirees associated with our institution, and would enable them to be a viable part of any listserv we create.

PAT WILKINS: I like the idea of retirees from either their home institution or from another state coming into an existing retiree association. At both Albany State and Georgia College and State University, not a lot of retirees remain in the area after retirement. If they could become part of a retiree association wherever they go, however, they could stay connected with others in higher education. I like the idea of using WebEx as a way of allowing persons at a distance to be a part of meetings. I like the idea of having retirees on search committees, especially for Executive Leadership positions. I think they would contribute a lot because of their years of experience. I would like to see retirees from one organization visit a retiree organization at another institution. At Georgia College and State University, one of our centerpieces is the old Governor's Mansion. It has been restored back to its 1860's vintage. Christmas decorations are in that era's style, for example. They pick a class from the elementary school every year to help decorate the mansion. This might be a very good field trip for a retiree group - from a visual and historical perspective. A docent tells

you about the history of the place. I would like to see those institutions that have newsletters share these with this group - especially where we are trying to set up a retiree organization.

I also think it would be a good idea to take a look at each Development and Alumni Office. Maybe we should seek out a seat on the Foundation or the Alumni Board. Retirees have a special place on both these boards in my view. Most of all, I want to thank everyone for all you've contributed to this meeting.

MISSY CODY: And I'd like to thank Pat again for making all the arrangements for us to meet here today.

DAVE EWERT: I've noted that all in here seem to be truly giving of themselves - for their friends, and colleagues to have a better life.

ERICA HART: It excites me as a liaison for the group. Whatever happens with our transition, thank you for allowing me to sit in.

CAROL POPE: I've heard so many ideas. I think it's tremendously important to get representation from all institutions on the USGRC.

JOHN BUGGE: We are looking for a President of the university. I didn't think about the fact until this meeting that we have no Emeritus member on the search committee.

DAVE EWERT: Look at the resources around this table - the wealth of experience in this room and the willingness to share and work with each other. My experience is we have no shortage of good ideas. It's implementation/execution that is the challenge. It helps to talk with others and get a better sense of how they managed some things. If you call or email folks in efforts to get things done, the worst that can happen is they don't respond.

QUESTION: Would you share your list of attendees with all of us?

DAVE EWERT: If it's OK with all of you, I will do this.

CAROL POPE: I'd appreciate it if anyone who distributed a handout at this meeting, who has it in digital form, would send it to me. And even if it's not in digital form, make sure I have a copy. Also send copies of your newsletters to me.

DAVE EWERT: Many of our newsletters are on our websites. So they are easily accessible there. The ones at Emory can be accessed at emeritus.emory.edu

For those who have a retiree organization, if you are willing to share this, what is something you did wrong, or thought was a mistake along the way.

JOHN BUGGE: We found it was a mistake to ask people for dues. We didn't get enough money from doing so, and what we asked seemed rather insulting. Now we say, once you graduate from your career, you will automatically become a member of our Association. We send an invitation to join. This has helped a lot and makes people feel better about the organization.

ANNE RICHARDS: I realized in speaking with Martha about how we handle compiling material for our Tribute Booklet, that I should mention how we went about things in the wrong way initially. We assumed that the best person to do a write-up about a given retiree was his or her supervisor, but we soon learned that some retirees didn't trust their immediate supervisors to take on this assignment, or simply didn't want them to have anything to do with it. This led us to begin asking retirees to provide us with the name of their first and second choice for doing this. We asked them whom they believed knew their contributions the best, or whom they trusted the most, or whom they thought would be most able to describe how they would be remembered at the institution. We discovered in the process that some folks chose individuals who never even worked at our institution. Some chose individuals who had long since left the institution. It was important for us to collect tribute statements that were actually meaningful to retirees. In addition, because our retiree association honors those from both faculty and staff, we learned that some supervisors or colleagues in staff positions on our campus didn't feel comfortable writing tribute statements, even when they were identified as the best able to describe a given retiree's contributions by the retiree himself or herself. Instead, it seemed to work better in those instances if we asked for a group of persons who knew the staff member to come together in a room and simply talk about their remembrances and ways of summarizing their former colleagues' contributions. Then those of us putting the tribute booklet together would edit their statements and present them in a coherent form in the booklet.

DAVE EWERT: We discovered that we were not relying on sponsorships enough. We knew a lot of people who could help us out when we needed various things, but hadn't thought of approaching them before.

GRETCHEN SCHULZ: We learned how important it is to have good leadership for our activities. Some people may volunteer to do things they are not well-suited for doing. Some may be totally inappropriate as leaders. We had to submit the names of persons we wanted to serve in leadership positions to our Provost and then the Provost appointed persons for various positions. We learned that we could not only survive and thrive with people ill-suited for given tasks if we surrounded them with all the support possible to make whatever activity or program the best it could possibly be. Once we did this, although not soon enough at one point, it worked.

And so far as scheduling speakers is concerned, it's nice to have the backup of a committee for the decision-making part. If someone says, "I'd like to give a talk," we ask what the person would like to address and say, "I don't make these decisions. We'll be taking this up the next time we meet as a Committee." This gives individuals organizing programs some protection, because even if some individuals have passion about their topics, they might not be good speakers.

LOUIE SCHMIER: I realized that we at Valdosta made a critical omission. I can't think of anything more important than giving support to a colleague in bereavement, reaching out to comfort that person in some way. I don't know what's more important, yet we haven't been doing this.

SOMEONE from VSU: said that, on behalf of the attendees from south Georgia, they appreciated that the meeting was held in the middle of the state and hoped the group would keep this in mind for future meetings.

DAVE EWERT: We've talked about having a general meeting in Atlanta once a year, and then another one elsewhere in the state at another time in the year.

CLARA KRUG: Some at Savannah State would have been here in attendance, but couldn't make it because of Homecoming and other events on that campus. In my earlier work with the GA Conference of the AAUP, we found that holding meetings in Macon brought more people to our meetings. It helps those of us who come from farther away, below the "gnat line."

JJOHN BUGGE: thanked the group again for their attendance.

ERICA HART took a group photo of attendees.

ADJOURNMENT: The meeting adjourned at 2 pm.

Respectfully submitted,

Anne C. Richards

Attachments:

VSU bylaws
USGRC bylaws