

HISTORY OF THE DEVELOPMENT OF THE ASSOCIATION OF RETIRED FACULTY AND STAFF OF THE UNIVERSITY OF WEST GEORGIA

Summarized by Anne C. Richards and presented to GA-HERO meeting held November 13, 2015 at Middle Georgia State University, Macon, GA

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.

WHAT IS THE MISSION OF THIS 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.

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.

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.

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.

