

## NOTES from MEETING of the GEORGIA ASSOCIATION OF HIGHER EDUCATION RETIREE ORGANIZATIONS (GA-HERO)

**Friday, April 19, 2013 from 11 am – 2 pm**  
**Kennesaw State University**

**Summary by Anne C. Richards**

**Present:** John Bugge (Emory University), Catherine Carter (Georgia Perimeter University), Missy Cody (Georgia State University), Joe Cook (Florida International University), Rankin Cooter (Georgia State University), Dave Ewert (Georgia State University), Ian Gatland (Georgia Tech), Bill Hamrick (Kennesaw State University), Samantha Helgesen (Kennesaw State University), Ellen Jones (Kennesaw State University), Allison Lampkin (Georgia Highlands College, Office of Advancement), Betty Malloy (Georgia Perimeter University), Anne Page Mosby (Georgia State University), Debbie Novak (University of West Georgia), Glenn Novak (University of West Georgia), Anne Richards (University of West Georgia), Annette Satterfield (Georgia Tech), Howard Shealy (Kennesaw State University), Joyce Swafford (Clayton State University), Ron Swofford (Georgia Perimeter), Martha Wicker (Clayton State University),

**Ellen Jones welcomed the group** to Kennesaw. She mentioned that KSU now has 25,000 students enrolled.

**Dave Ewert welcomed the group**, noting that its first meeting took place on January 5, 2012, followed by meetings at Emory University and Clayton State University. This is the 4<sup>th</sup> meeting of the group. He said he hoped that during lunch we might be able to discuss what we'd like to accomplish with our individual organizations and how others have dealt with similar goals on their campus.

Ian Gatland announced that the **next meeting of GA-HERO** will be on Friday, October 25, 2013 at the Georgia Tech Hotel. The President of GA Tech has offered to cover the cost of food. The room is free to us. We need 25 persons to use the room, which has a limit of 40 persons. If we have over that number we'll have to find another room. Only cost to participants will be parking – estimated at \$9 if one stays no more than 4 hours, \$12 if longer.

### CAMPUS REPORTS

**Kennesaw State University:** Retirees have enjoyed a “Passports and Pastimes” program, also known as Travelogue and Hobby programs. Some show slides of their travels. Others describe things they might have made or hobbies they've taken up. Main focus of the organization is scholarships. This Fall will be their third year of giving out scholarships. Recipients have to have a connection to some KSU retiree (either as child, grandchild, etc.), have to be a direct descendant or family relation to a retired faculty or staff member at Kennesaw with at least ten years of service to the institution. Money comes in at the rate of \$50/month or in small donations. The group has no endowment, yet puts the scholarship money together as a “labor of love.” Retirees there

are “amazingly generous.” 11 scholarships have been awarded at \$1,000 each since March of 2011. Retirees are asked to sign a five-year commitment/pledge. Some have written personal notes on requests for donations, which has enhanced the monies coming in. The regular process in place for selection of scholarship recipients is gone through to determine who is awarded a scholarship.

**Emory University:** John Bugge reported that retirees at Emory University especially like wearing name badges that the group there has created. This gives them a greater sense of being bonded with the university. A former Business School Professor has established an endowed lecture series, now in its 10<sup>th</sup> year. This is a “ritual” gathering for the retiree group. People look forward to it. This year, Mike Lukovich, cartoonist for the *AJC* was the speaker. He cartooned on the spot. The group originally had office space at the Georgia Mental Health building. They inherited orange furniture, then painted the walls orange, then created an art gallery. Art was solicited from colleagues. The group has since been relocated but the art program has been revived and is very successful. Many who didn’t come out for other activities come out for this one. Prizes are given to artists (first and second place – money prizes). The group also holds an annual “volunteer reception” – to honor those who participate in volunteer activities for projects the group takes on. For example, every month some retirees spend an entire day sorting out medications to go to third-world countries. Some participate in a food drive, etc.

**Georgia Perimeter University:** Betty Malloy reported that a “Show and Share” program was begun last Spring. Four retirees were given 10-15 minutes each to talk about something they have done since retirement that they hadn’t done before that. This has become an annual event. One woman talked about jewelry making. Another about doll-making. The latter makes “delicious dolls” – similar to folk art. She makes clothes and accessories for the dolls. Each has a name. One has been taken to Spain. Owners talk about them in correspondence. Another former member of the English Department faculty has begun making quilts with pictures of family members on them. Another retiree wrote a book and got it published. This month only three persons have been invited to a similar program – to give them more time to speak. One started a business. One wrote a book of poetry. Another (member of the English Department) has been involved in a research project involving geologists, astronomers, physicists, etc. He is building connections with people he knew in the past, and exploring the history and legends of encounters with mysterious lights seen in the mountains of North Carolina. He himself had a personal encounter with these lights at seven years of age. The group also held other social events and has an endowed scholarship (\$20,000). It goes to a person who is going through a mid-life career change. Interviews are conducted by the scholarship committee already in place for the university, but a member of the retiree committee sits in on the interviews. The scholarship pays a student’s tuition for one semester.

Allison Lampkin asked if “tuition” covered both tuition and fees, noting that in the past no fees were in existence or of consequence but currently are often more than tuition itself.

Reponse: This scholarship is only for “tuition.”

**Georgia State University:** Rankin Cooter reported that retirees get free “Panther cards” from the university. These have the individual retiree’s photo on them, and make it possible for retirees to park free of charge in any lot on the Georgia State University campus. This year Georgia State University is involved in celebrating its 100<sup>th</sup> year of existence. There are festivities throughout the year – some at the Rialto Theatre, some receptions, etc. At their last meeting, the group discussed including an infusion of retirees besides the emeriti faculty that now comprise the group and is currently looking at how this will affect their budget. No fees are collected from members. They have some endowment dollars at their disposal, which comes from the office of the Provost, annual donations from retirees, and member contributions. Many successful events have been organized. Leadership from the University’s Foundation has given good support out of admiration for the efforts put forth by this group. Sandra Owens is coordinator of the Communications Committee and puts out an excellent newsletter. There is a good GSU emeriti website.

Anne Page reported that for two years the group has held a program involving a series of authors. Four times a year, GSU faculty are invited to make a presentation on a recent book they have published. One in the past was a biography of Flannery O’Connor. Another about Admiral Elmo Zumwalt. Paula Stephan wrote *How Economics Shapes Science*. She is an economist selected as “person of the year” by a professional organization. A wide variety of author presentations have been made in this program.

Ellen Jones: Are there any requirements on the kind of book you feature? Self-published? Award-winning?

Response: No. One person talked about her involvement in the circus (the “wicked stage”) before becoming a Sociologist. Refreshments are served, one highlight of the program. About 25-35 attend such programs. Eugen Schoenfeld, a Holocaust survivor who became an academic sociologist, discussed his book entitled *My Reconstructed Life*.

Missy Cody, program chair for the group at GSU, reported that an effort is made to develop programming that is “fun” and will “involve and engage emeriti faculty.” Roughly 6 programs a year are organized, all of which include luncheons. (1) A program is set up at the time of Homecoming. New emeriti retirees are introduced and welcomed. The provost talks about the state of the university. Approximately 40-50 attend. (2) Another is on Benefits. This “brings people out of the woodwork. Sometimes as many as 80 are in attendance. Includes children of retirees who have questions. Some questions are sent in advance so there is time to prepare a more substantive answer. Those attending can ask any questions they have, including those related to Social Security issues. (3) Another program is essential a holiday party, hosted by one of the emeriti. Food is provided by the Emeriti Association. Money for this comes from the group’s endowment, contributions from emeriti, and a budget from the Provost’s Office. (4) In Spring, an informative and fun program is organized. The last one was focused on “Inflammation, Immunity, and Infection.” The speaker related all these topics to love

and discussed ways in which going overboard on any one of them could lead to arthritis. Research being conducted at Georgia State University was highlighted. (5) A Valentine's luncheon was held, which brought out about 100 people. Program involved music, theatre, and a presentation by the new football coach. The group learned that GSU standards have been established for student athletes having to do with both grades and behaviors of other sorts (e.g., not wearing caps backwards, opening doors, participating in community service activities). (6) A program focusing on "Fitness – the Fountain of Youth" was presented by retired faculty who are still running in marathons. The group has conducted surveys of the membership to determine what interests them. A program on "Memory" was found to be of interest. It was presented by a faculty member with a Ph.D. who is also licensed as a Professional Counselor and works at the Gerontology Institute on campus. Focus: what happens when you start to lose memory? What parts of memory get better over time? How can people help themselves with memory they're losing? As part of this program, retirees were offered free testing of their memory to establish a baseline. This enables them to better determine memory loss, or to follow advice given to retain or improve memory capacity.

**University of West Georgia:** Glenn Novak reported that the UWG retiree group is the Association of Retired Faculty and Staff (ARFS). As a result, its current activities are geared not just to faculty but involve persons ranging from those serving as president of the institution to those who might have done custodial, maintenance work, etc. The one large event planned annually is a retiree reunion. It honors the current crop of retirees and gives other retirees an opportunity to come back to campus. Recently, the event has been shifted from summer to fall – to increase attendance (as many honorees and retirees are out of town during the summer). In the coming year, this event will take place off-campus. Due to support and research from the Alumni and Development staff, the event will be held at a local country club located across the street from the university. The room will be provided at no cost. Lunch will cost the same as it currently does on campus (if provided by the campus Food Services operation, ARAMARK). The event involves, food, conversation, presentation of medallions to retirees (engraved with their name, department and years of service). It also involves a "tribute booklet" that Anne Richards will talk about further (see below).

In addition, every third Thursday, the group holds a travel program. A retiree who has traveled shares slides and information about a particular destination. The program is held at the local public library and publicity goes out about it in the local paper, on the ARFS listserv, etc. Glenn noted that the UWG group would like to hear other ideas about different types of programming from those attending today's meeting. The Library on the university campus has involved a number of retirees in making presentations that are very well attended. To avoid redundancy, however, the retiree group doesn't want to reschedule the same presenters.

Anne Richards reported that a "tribute booklet" is created for each retiree reunion. When the economy and school budgets were in better shape, the group was able to use color pictures on the cover and had no restriction on the number of pages in the booklet. After the recession came along, the university had fewer funds to support publication of this booklet. As a result, the cover is now done using one color ink (black) and the write-ups about each retiree are limited to 200 words each, which means a LOT has to be

left out for faculty who have a distinguished record of achievement. Still, this includes a photo of each retiree, a record of the department[s]/unit[s] on campus where each has worked, a summary of the contributions made by each retiree to the institution, and information about what each plans to do in retirement.

In response to the question about how many retirees are associated with the University of West Georgia, Debbie Novak replied that there are 300, of whom 180 are subscribers to the UWG ARFS listserv. A newsletter is mailed thru regular mail quarterly. It covers activities of retirees, benefits for retirees, etc.

John Bugge reported that Emory University has developed a brochure for informing faculty of retirement benefits before they retire. A seminar is held regularly for those considering retirement and this is used as an opportunity to distribute the booklet and to seek to interest retirees in the retiree organization on that campus.

**Georgia Tech:** Annette Satterfield reported that Georgia Tech's retiree organization, known as the "Silver Jackets" is composed of both faculty and staff. They meet monthly, January through May. Somewhere between September and November they hold a program with Human Resources personnel, which is very popular with their membership. They have a holiday luncheon in December. About 400 members get e-mail. The average attendance at programs is 30-35. Many Georgia Tech faculty don't remain in the local area after retirement. The organization had been primarily social and volunteer. Recently, a survey of their membership was conducted, asking members what they wanted from the organization. The membership response indicated the members want the organization to stay what it is and has been. They don't want to take on raising money or doing anything difficult. Their signature volunteer project involves assisting with a blood drive. The drive occurs once a month. The retiree organization runs it one day for the students. Annette reported that faculty at Georgia Tech love anything they can do that involves working with students. The hope of the group is to expand their volunteer activities in the future.

Each year, GA Tech has a banquet for retirees and invites the Silver Jackets to give a presentation at that banquet. This raises awareness among retirees and the administration about the existence of the Silver Jackets. The organization doesn't get support from the university except a room in which to meet. The exception will occur this Fall. The organization has asked for and gotten funds from the administration to pay for lunches for participants attending the next meeting of GA-HERO on that campus. Money for the organization's activities typically comes from random persons who choose to contribute to the group. No fee is charged to be a member of the Silver Jackets. The HR office on campus is "extremely supportive" of the group. Tech has recently hired a retirement specialist (with benefits experience) to join the HR staff. At the last meeting of the Silver Jackets, held on HR issues, a representative from the USG was the speaker.

Ellen Jones reported that the retirement organization at Kennesaw was begun by the Advancement Office. The office surveyed retirees and got a response rate of over 50%. More recently the group is being surveyed to see if they like what Advancement is doing on their behalf. The group asks for annual donations from members.

**Clayton State University:** Martha Wicker reported that the retirement organization at Clayton includes both faculty and staff and a fee of \$15 is charged per year for dues. Coinciding with the 10<sup>th</sup> anniversary celebration for CSU, a “legacy project” was undertaken by the retiree group to create a butterfly garden on the campus. The formal dedication of this garden will take place in May of 2013. The group has also organized “a lot of social events.” These include a monthly “movie club.” Academic movies tend to be selected, but attendance is greater at more popular movies. The group used to sponsor a book club. They have arranged a trip to Gibbs Gardens and are considering a future trip to a winery in the mountains of Georgia or to the monastery at Conyers. They have an endowed scholarship for a graduate student. In the Fall, the group hosts a gourmet wine/dinner event with a raffle included to raise money for the scholarship. The group gets cards that entitle members to library benefits and other benefits on campus. Personnel who create these cards were invited to the fall meeting of the group for the convenience of group members. Parking decals were also distributed at the same time. Information was taken for the cards in the early portion of the meeting, and cards were brought back for distribution before the meeting ended. The group is trying to encourage its membership to be more involved on campus. One project has involved their working in the library archives, identifying people in photos and organizing documents.

Two questions the Clayton State group had were (1) how do other organization members get their mail? (2) how do other organizations handle processing of funds for the operation of their organization? At Clayton, monies go through the campus Foundation before notification comes to the retiree organization, and the retirees don’t get financial statements in a timely manner.

Ellen Jones noted that, for tax purposes, retiree organizations want their monies to go thru a Foundation first. Also, this prevents the organizations from being liable for loss. She recommended that the Clayton State group ask their Foundation personnel how retirees could assist them in helping the retiree group get information in a more timely manner.

Allison Lampkin said it might help for the group to have a mailbox in the mailroom itself. She also suggested the group explain their situation to the Advancement Director and ask for a monthly reporting of their funds.

Rankin Cooter reported that retiree organizations that provide ID cards to their members which carry their campus affiliation make it possible for retirees to secure hotel reservations at the government rate.

Martha Wicker reported that at Clayton State, the only retirees who receive e-mail correspondence about what’s going on are those who pay the \$15 membership fee. And retirees get a choice as to whether they want e-mail or snail mail correspondence.

Joyce Swafford reported that Clayton State is also working on developing biographical profiles of their retirees to assist persons who might be asked to contribute information for future obituaries. Recently, and sadly, when a request was made for information about a retiree for this purpose, there was little available to provide.

**Florida International University:** Joe Cook reported that he wanted to come to all of the programs that had been described at this meeting. He said he also believed that FIU was about 1,000 years behind what folks have described going on here in Georgia.

## LUNCH BREAK

John Bugge noted that it would be useful if all those present at the meeting would consent to be on the listservs for all other groups in the state as this would enable them to get a lot of good ideas about what was going on elsewhere.

Following lunch, a presentation was given by Justin Rabideau, Interim Director of the Bernard A. Zuckerman Museum of Art. Justin discussed Museums, Archives and a Rare Books collection at Kennesaw State University. He described the history and development of the Museum of History & Holocaust Education, the Bentley Rare Book Gallery, the Athenaeum Gallery, and the Bernard A. Zuckerman Museum. He also mentioned a number of the meaningful programs and exhibits that are available to the public and transported (even state-wide) through these facilities and explained the nature of “fore-edge painting.” Property given to KSU in 2008 (north of Cartersville) was also described. This is land originally belonging to Corra Harris, author of *A Circuit Rider’s Wife*. It is used as a lab and resource area. Students conduct botany and other projects there. It also has a working aviary that makes honey for the campus. Tours of all these facilities are available for interested parties.

Dave Ewert provided a brief history of the development of GA-HERO. He and John Bugge first met at the AROHE meeting in 2010. The AROHE meeting takes place every other year. Dave and John worked to bring GA-HERO into existence, beginning with an organizational meeting in January of 2012. At Georgia State University, Ewert reported that the retiree organization initially created there wore out its volunteers within 9 months. Since then, it has acquired a (paid) administrator and the university provides the group \$6,000 annually to put out a newsletter.

Dave reported that at Dalton State, retirees are very angry at the administration for not starting a retiree organization and for kicking a retiree out of the gym for not having an authorized card for entry. He noted that five persons from as far away as Valdosta State University attended the last organizational meeting of the GA-HERO group. He encouraged those in attendance at today’s meeting to reach out to retirees at other institutions across the state to inform them of the efforts to get a state-wide GA-HERO group going. The purpose of the meetings of the GA-HERO group is to encourage best and successful practices in retiree organizations. A classic problem for such groups is “management succession.” Dave encouraged those in attendance to inform the GA-HERO group about those involved in retiree groups around the state and to bring future leadership and administrators associated with such groups to subsequent GA-HERO meetings.

Ellen Jones mentioned that if retiree organizations on particular campuses have no staff support, members should make an appointment with Advancement personnel to discuss getting such support. Even the support of a graduate student research assistant can be helpful. July 1<sup>st</sup> is the start of the new budget for work-study assignments. Students might be able to work on developing a database of retirees, among other things. Monies in support of such groups might also come from the Provost's Office (which has a vested interest in sustaining institutional memory), the Advancement Office, or the HR Office. If retiree organizations are not presently getting staff support, Ellen thought it was possibly because their administrations didn't know the retiree groups existed. Further, if persons don't seem to see the benefit to the institution of doing something like this, Ellen volunteered to discuss the matter with them. She mentioned that Advancement personnel don't often talk to retirees except over the phone when it's likely they're eating dinner. And the call is typically because the university wants a donation. Too often, institutions forget about all retirees can contribute besides money. If institutions start a relationship with retirees sooner, retirees may be more inclined to give more money at some point in the future, and volunteer their time for particular causes or events. Ellen said it's important to spread the word about how badly institutions are treating retirees and how many more connections can be made with them besides just asking for money. She underscored the hope that institutions begin thinking about retirees in ways other than their pocketbooks. She also mentioned a presentation she wanted to make to either CASE (Council for Advancement and Support of Education) or GEAC (Georgia Education Advancement Council). GEAC has turned down the presentation for its next meeting. Allison Lampkin said she might know someone on the GEAC Board she could speak with about the matter.

John Bugge said he didn't know if retiree organizations do a good enough job of communicating to their institutions what their groups do or can do for the university. At Emory University, for example, retirees teach some classes without charging anything for doing so, mentor students, assist students with honor's theses, etc. He said he thought retiree organizations ought to be a model all institutions in Georgia adopt in relation to their academic and development mission. Since discovering the existence of the retiree group at Emory, the university is making a more serious attempt to tap into their monetary resources (wills, etc.) and this is seen as a "great leverage point" in making a case to the university about supporting such groups. From this perspective, Development officers should be founding retirement organizations on their own initiative. John also expressed the view that GA-HERO should have a role as a lobbying force. Many faculty have a lot to say about how higher education should go. They could be a force working in the state legislature and for the improvement of higher education.

Dave Ewert noted that AROHE has the same ambitions and aspirations on the national level. It began in California (at USC) 30 years ago and currently has chapters on the east and west coasts but "vast swaths" of the mid-west are unrepresented in AROHE. He thought AROHE had the potential, however, to become "the AARP of Academia" if more institutions could be involved in its development. He mentioned that Sue Barnes, at UC Davis, the new president of AROHE, is a dynamic person, a "mover and shaker."



He said he hoped a website or Google Group for the GA-HERO group could soon be established.

Betty Malloy, a member of AROHE, informed the group that she has gotten a lot of good ideas from her involvement with this organization. She attended a national conference of the group and found its structure for breakfast-table discussions to be very meaningful. At each breakfast, a round-table discussion took place on different topics. One was on how to increase membership and develop brochures, one on field trips, one on newsletters. So far as the latter was concerned, it has been discovered that on-line newsletters are NOT a good idea as some members don't use computers. As a result, the group she is associated with is now back to printing their newsletters. So far as membership fees are concerned, she learned that some charge none, some around \$15, some \$15-25. One has created a life-time membership fee of \$300 as a membership option, which is also a tax write-off.

Ellen Jones said the "biggest benefit of AROHE" is the research the organization has done on organizations around the country. As a result of what she has learned from this organization, she can talk to administrators about why the role the Advancement office plays in working with retirees should be expanded. Currently, only half of her time is devoted to supporting retirees, but she would like additional time for this. She also spoke of how welcome she feels in the presence of retirees – likening it to being in a room full of grandparents.

Betty Malloy mentioned that some emeriti faculty serve people outside the USA. Some retiree groups are provided with senior housing.

Someone noted that a lot of corporations that serve seniors might be willing to give money to have access to retiree groups for a lecture or presentation once a year.

Allison Lampkin mentioned that Liberty Mutual offers faculty/staff at Georgia Highlands College group discounts for insurance and gives a percentage of the fee charged to her institution. This brings in about \$200-\$300 a month for Georgia Highlands College. She suggested going to Liberty Mutual nationally or to a Georgia representative of the organization and asking if the group would be willing to sponsor a retiree organization. She said Liberty Mutual had given her up to \$1,000 for an event.

Dave Ewert noted that organizations that offer housing, medications, or financial services for seniors might also be approached for sponsorship.

Dave Ewert reported that AROHE offers an on-line newsletter every other month, and also has a blog associated with it.

John Bugge mentioned that faculty who retire typically continue to do some sort of professional work and need institutional support for same. Formerly, institutions in Georgia used to supply software to retirees upon request, but no longer do this. The same

was reported to be the case at Clayton State and the University of West Georgia. It was agreed that more could be done to call for reinstatement of this support.

Dave Ewert presided over a review of the amended version of the Bylaws of GA-HERO that had been distributed on-line in advance of today's meeting. The changes in yellow were reviewed and found to be acceptable to those at the meeting. It was agreed that the word "affairs" (found in Article 4, Section 3. Powers and Article 5, Section 3, Duties of the President) should be changed to "operations." It was agreed that, for the sake of clarification, the statement in blue "The President shall be the Chair of the Board and preside at all meetings of the Board and at all meetings of the Members" should be inserted at the end of Article 5, Section 3, Duties of the President.

A considerable discussion took place regarding Article 8, Amendment of Bylaws. It was finally agreed that a statement parallel to that found in Article 5, Section 5 – Duties of the Secretary #3 should be inserted with regard to amendment of bylaws. It would read something like: Notice should be issued by mail, telephone, facsimile transmission, electronic mail, surface mail or other similar means of communication 45 days in advance of consideration by the membership of any proposal for amending the bylaws.

Having achieved consensus about the matters noted, those in attendance at the meeting accepted the bylaws as revised during this meeting.

Dave Ewert thanked Ellen Jones and those hosting this meeting at Kennesaw State University and expressed appreciation for the congenial place in which we met.

Adjournment: The meeting adjourned at 2:00 pm.