

**GA-HERO**  
**Meeting at Middle Georgia State University**  
**Room 237**  
**Macon, GA**  
**November 17, 2017**

**NOTES**

**ATTENDEES:**

**Retirees and active employees):** John Balsam (Georgia Institute of Technology), Ron Bohlander (Georgia Institute of Technology), David Boyd (Valdosta State University), Carol Braun (Clayton State University), Jim Braun (Clayton State University), Helen Brown (Clayton State University), Lynne Bryan (Middle Georgia State University), John Bugge (Emory University), Mitch Clifton (University of West Georgia), Missy Cody (Georgia State University), Harry Dangel (Georgia State University), Bob DeLong (Valdosta State University), Carolyn Derden (East Georgia College), John Derden (East Georgia College), Dave Ewert (Georgia State University), Daniel Hagan (Georgia Southern University), Dennis Marks (Valdosta State University), Bob McDonough (Perimeter College of Georgia State University), Betty Molloy (Perimeter College of Georgia State University), Carol Pope (Kennesaw State University), Anne Richards (University of West Georgia), Dutchie Riggsby (Columbus State University), Gretchen Schulz (Emory University), Laurie Shaw (Middle Georgia State University), George Stanton (Columbus State University), Joyce Swofford (Clayton State University), Ron Swofford (Perimeter College of Georgia State University), Kathy Tomajko (Georgia Institute of Technology), Ted Wadley (Perimeter College of Georgia State University), Fred Ware (Valdosta State University), Martha Wicker (Clayton State University), Dorothy Zinsmeister (Kennesaw State University).

**Presenter:** Chris Rosenbloom (Nutrition Professor Emerita, Georgia State University)

1. **Dave Ewert welcomed the group** at 10:00 am and summarized the agenda for today's meeting:

Presentation by Chris Rosenbloom on "Food and Fitness After 50"

Update by John Bugge on the AROHE 2018 Meeting at Emory

Report by Missy Cody about the USG Retiree Council (USGRC)

Presentations (moderated by Dorothy Zinsmeister) on "Best Practices" in retiree organizations

Dave also explained that GA-HERO is a Georgia network or association of college- and university-based retiree organizations that seeks to foster the development and sharing of ideas, information, current research, advocacy, and best practices among its members. Additionally, GA-HERO endeavors to create awareness that campus-based retiree organizations are beneficial to both retirees and the campuses on which they are based. Dave mentioned also that there are a number of persons in this group who can serve as mentors for campuses that are in formative stages of developing a retiree organization. Current officers of GA-HERO are as follows: President - Dave Ewert (Georgia State University); Vice-President/Treasurer - John Bugge (Emory University); Secretary - Anne Richards (University of West Georgia); Webmaster - Carol Pope (Kennesaw State University).

## 2. Introduction of Attendees

Attendees present (see list on p. 1) introduced themselves to one another, providing their name, discipline or area of employment focus, and campus affiliation.

## 3. PRESENTATION by Chris Rosenbloom on "Food and Fitness after 50."

Missy Cody introduced Chris, a person she has known for over 30 years. While recommending that attendees go on line to find a more detailed bio about Chris, Missy highlighted aspects of Chris' background. She said Chris had been an Associate Dean at a time when Georgia State was going through a lot of changes. She has also been a consultant to Georgia Tech sports teams, and a consultant and supporter to other teams, including those involved in the Olympics. Chris has a Ph.D. in Sociology and a certificate in Gerontology from Georgia State University. She is interested in mature, senior athletes and those who need to be well to live high quality lives. She has excellent research skills along with the ability to translate research findings in down-to-earth and meaningful ways. Missy added that those who have spent their lives doing research and always wanted someone to do something practical with it will find Chris to be an excellent communicator.

Chris said she was happy to be here today to talk about "Food and Fitness after 50" with this group. As we get older, she mentioned, it's important to think about our own health during the aging process. Some say to her, "I'm 65, and darn-done." But she tells them they'll likely have 20 more years of life and "We want to be the best and the healthiest we can be at any age."

She, herself, has two goals at this point: to be able to lift her own suitcase into an overhead bin on a plane, and to be able to buy the 50 lb. bag of dog food at the store and lift it into her car. "I want to be functionally fit," she said, not someone who might be featured on the cover of a magazine because of how they look. When others who are aging complain about what their arms look like and want to do something about it, Chris tells them: "That's why God made sleeves."

She mentioned that she has a website: [chrisrosenbloom.com](http://chrisrosenbloom.com). She also has a blog that includes feature stories about people who inspire her. She announced that, after today's meeting, she would send an invitation to all attendees present to connect with the blog and they could determine whether or not they wanted to do so. She also said she had a pad of paper and a pen handy so she could write down questions she might not have the answer to today and promised to email responses to those in the room who provided email contact information when they registered for today's meeting. She tells her students that it's ok to say you don't know something (when you don't) rather than to make up answers on the spot.

She has just come out with a new book, co-authored with Bob Murray, entitled *Food & Fitness after 50. Eat Well, Move Well, Be Well.*

At one point, while Chris was teaching at Georgia State University, a friend at Georgia Tech (Mindy Millard-Stafford, in Biology) who was testing some football players for high blood pressure, hypertension, and high cholesterol, invited her to become a consultant on the project. In the course of this work, she was able to provide an internship for a student and a full-time sports dietician was eventually hired at Georgia Tech. One day, Charles ("Lefty") Driesell then a basketball coach at Georgia State University, called to say he had heard what she was doing at Georgia Tech and invited her to talk to the athletes at Georgia State.

"We won't talk about high-level research today," Chris said. "I didn't want to do 'death by Power Point,' so there will only be a few slides." Companies don't want to support products for people our age, Chris stated, despite the fact that we have money, resources, and time. For years she has been telling the Gatorade company that they need to have a "Later Gaters" beverage that is not as sweet and has less salt in it. Their focus is on reaching millennials at this point, however.

Her co-author on the book, Dr. Bob Murray, contributed a "fitness chapter" to the book. This is the first book written for consumers. Chris said she found it a lot easier to handle than the tough process of editing a book (where you have to wait on authors to complete chapters that should have been completed much sooner). Because she considers herself a "good task master for myself," the development of the book proceeded nicely. The hard part was determining which content would go in it and which would not. She found herself wanting to put everything in some kind of scientific light in the book, but the editor they were working with cautioned against this.

## EATING WELL

Chris mentioned that the "Eat Well" section was her piece. "You are what you eat" is a phrase many of us have heard. It is believed to stem from a comment made by a French physician in 1820s - "Tell me what you eat and I will tell you what you are." In today's world, for example, if you always eat at fast food restaurants, one might ask: "Are you fast, cheap, and easy?"

There is a lot of misguided nutrition advice out there. This is the "best of times" in that everyone is interested in nutrition. But all who claim to have expertise in this area may not have it. One person once explained that if your doctor tells you don't eat gluten, you should pay attention. But if your neighbor tells you don't eat gluten, you should ignore the suggestion. At a baby shower, Chris was once told by a participant: "A nutritionist told me to never, never ever eat carbs!" But she had to tell her, there is no such regulation in the field of nutrition. And, of course, persons need carbs because this is what our brains and muscles run on. Protein, meanwhile, is "the most important thing that we should eat."

Some have heard of a special Keto diet that calls for eating a high amount of fat in order to oxidize fat. They believe that might be best for them. But athletic performance may suffer if a person eats a very limited amount of carbs or no carbs (as this diet recommends).

Someone told Chris that "I can't eat fruit; it has too much sugar and sugar is poison." On the other hand, Chris explained, fruit also has vitamins and minerals in it.

Some athletes say, "I'm paleo" - while eating a sub sandwich.

There are many myths around food. Some believe they can't lose weight after menopause. "It is more difficult," Chris stated, but not impossible. Having low estrogen can lead one to acquire more belly fat. She asks women: "What is your goal with weight?" Some say they want to lose 5 pounds. She tells them: Instead of focusing on losing a set number of pounds, consider instead: "Just don't gain any more weight."

Some believe their problems with weight or disease are all related to genetics and there is nothing they can do about their health. According to Chris, however, most chronic diseases have a genetic component, but it takes environmental conditions to bring it out. Sometimes this belief in the significance of genetics is used as an excuse. In a study Chris mentioned, even those with highest risk for heart disease, had a 46% lower rate of getting it if they quit smoking, and had a program of healthy exercise and eating.

Some say: "It's too late for me to start to eat right and move more." Or, "It would take a gym membership I can't afford for me to get fit." This is not so, Chris said. One senior explained how he worked on balance issues by standing on one foot for a time and then changing to the other while he flosses his teeth. There are other ways to engage in fitness stretching exercises using the weight of your own body or implementing a workout using soup cans.

Some ask her: "What is the best diet for aging well?" Chris responds: There is no best diet, but lots of good ones. It's also the case that, typically in January, "a million diet books come out."

A good diet includes the following factors:

- (1) Inclusion of all energy-containing nutrients (carbs, protein, fat)
- (2) A focus on nutrient-rich foods
- (3) A concern for disease risk and management of this
- (4) Enjoyment of eating and meal-time.

Many of us have chronic diseases and have to pay attention to what we eat as a result. Some say they are on a statin drug and therefore can eat what they want. Chris maintains, however, that medications of any kind still have side effects, including costs. As one pharmacist said: "Medications are poisons with desirable side effects." If physicians would be a little more assertive with their patients and recommend they see a dietician, that would be a help. Some individuals focus on (4) above, and not on other items. And some new houses are being built these days without dining rooms - since communal meals with family don't happen as much as they did in years past.

Lefty Driesell asked Chris to provide a program for his ball players on how to use a knife, fork, and napkin. They tended to eat like cavemen and he thought they needed some "class" in case they went out on a date or had an opportunity to interview somewhere.

Several eating plans are discussed in the book, e.g., Mediterranean diet, Dash diet (to stop hypertension), and the Mind diet - purported to improve cognitive functioning (interesting, but it's not clear if it really works) - and the Flexitarian diet (primarily plant-based/vegetarian, but meat is eaten occasionally). Chris mentioned that a more plant-based diet is better for older folks.

Strength is a function of skeletal muscle mass. And we lose 10-15% of our muscle mass beginning at age 40. Sarcopenia is a "wasting of the flesh."

- a. The greater strength/muscle mass you have you are at a reduced risk for death.
- b. As we age we need to practice strategies to retain muscle strength - engaging in physical activity combined with high-quality proteins. She showed a slide of a thigh of a younger person

next to a slide of a thigh of an older person. The older person's thigh had more fat around it - and it had more fat marbled in the muscle.

Recommendation from an international group: As we age we need more protein than the recommended dietary allowance at every meal. And we need it spread throughout the day. Some have less than 50% of the protein needed daily in early parts of the day and over 70% of what is needed at dinner. You want to have protein spaced out evenly throughout the day for optimal muscle protein synthesis. Muscle protein breaks down during the day as well. With strength training, you'll see muscle protein synthesis occur - through resistance exercises. There is anabolic resistance to muscle protein in aging. As we get older, our muscles aren't as receptive to taking up protein. We can build muscle, but need more protein to make that happen. The amino acid LEUCINE is an essential amino acid. This triggers muscle protein synthesis. Research (done at McMaster University in Canada and in the Netherlands) has shown that a high quality protein is needed after exercising.

What has protein?

Raw eggs (4.6 of them = 32 calories) - each has 6 grams

Greek yogurt, (5 oz, nonfat) - 13 grams

Chicken breast (grilled, 3 oz) - 26 grams

Top round beef (broiled), 3 oz) - 26 grams

Skim milk (8 oz) - 8 grams

Soy Protein isolate

Whey Protein powder - one scoop = 92 calories, 17 grams

Cottage cheese - 1/2 cup = 14 grams protein

Quinoa - 1/2 cup - 4 grams

Peanut butter (creamy) - (2 Tablespoons) = 9 grams protein

You should aim for 25-30 grams of protein per meal and do this spread throughout the day. If you are a vegetarian, you can get high quality protein from soy or quinoa. More isn't better.

You'll just oxidize it if you have more. And then you need more water and also have to do strength training.

## MOVING WELL

When Chris is asked "What is the best exercise to do after age 50?" she replies: "The one you'll do." And when asked, "What's the best time to do it?" she replies: "Whenever you'll do it." She, herself, likes to do her exercise in the morning so she doesn't have excuses to skip it. 150 minutes of moderate intensity aerobic exercise ever week is good. It should cause you to breathe hard and get your heart rate up. Muscle strength exercises should work all the major muscle groups.

Only 21% or 1 in 5 (across all age groups) meet the minimum guidelines for muscle strength. As retirees, you have time to exercise. And with Silver Sneakers, you have other opportunities. Are you taking advantage of this through your Medicare Supplement program? If not, look at this during an open enrollment period.

Endurance is cardio-respiratory fitness. Strength exercises should be done 2 times per week. And there should be progressive resistance. Rather than lift a 3 lb. weight forever, you should progress with heavier weights over time. Give yourself an experience of "going to failure" (i.e., where you can't actually do something you attempt). Gaining strength is not just a matter of going for a stroll with your dog. "No challenge, no change" is an apt phrase.

Balance, agility, flexibility goes pretty quickly as one ages. You discover you can't bend over easily to tie your shoe. You feel wobbly. Most important is to prevent falls. A fall can start you into a downward spiral to serious problems.

My husband was an athlete, Chris said, but now he says "I'm just so slow. I feel if I fall, I can't stop myself." Yoga, Tai Chi, Martial Arts exercises can be helpful for this. Chris herself takes Yoga twice a week and finds it works on lots of things. It even helped her husband improve his golf swing.

## BE WELL

What does it take to Be Well?

Sleep (which gets harder as we get older)

Less Stress

Social Support

For better sleep, it can help to sleep in a cooler room that is dark. Put your phone away. You don't want bright screen signals sent to your brain at night - this tells the brain to wake up.

You can find ways to cope with and manage stress. Exercise is the best way. It helps you put things in perspective. It helps you become more mellow and calm. It can also be helpful to mitigate stress through spiritual, religious, meditative practice. Some have used only one way in the past - going to the bar.

Social Support, especially for men, is particularly important for health and longevity. Many men have a wife who makes all the plans about going out for breakfast, getting involved in a civic organization, coming to a GA-HERO meeting, etc.

Something to keep in mind . . . it's never too late to eat well, move well, and be well. There is a woman known as the "Iron Nun" who was the oldest person to finish a marathon under three hours. And she's 77. Someone named Julie Hurricane Hawkins is 100 years old. She broke the 80+ years record for the 100 yard dash. She's the oldest female to complete the 100 yard dash in 40.2 seconds. Usain Bolt does it in 9.58 seconds, but he's much younger. Someone else broke the Penn State Relay record at age 80. She began running at age 67.

Chris explained that her book (*Food & Fitness after 50*) came out last week and was featured on the marquee in Times-Square. She brought extra copies to today's meeting for those interested in purchasing one, and said she was willing to sign them for attendees.

QUESTION/ANSWER period:

Helen Brown: I have a big problem with soreness the day after exercise. I have to do a little exercising and then see how it goes.

Chris: To deal with delayed onset muscle soreness, it helps to "cross-train." Do something different the next day.

Helen Brown: Is there any supplement I can take for this besides Advil.

Chris: Some athletes use tart cherry juice.

Question: Did you supervise the preparation of today's lunch?

Chris: I did not.

John Bugge: My son is 25 and on a body-building kick. He takes a protein supplement. Is there any difference in them? Are some better than others?

Chris: Whey protein is good. But look for a brand that has third-party verification. Is it NSF certified, for example? This lets you know it has been tested and has been found to have no banned substances in it. Products certified by Informed Choice or NSF are good. For athletes, having some protein before sleep can help. So whey, casein, and milk can come in handy.

Dorothy Zinsmeister: If you haven't had a chance to look at Chris' book, I recommend you do this. I'm going to get copies to give as Christmas presents. She talks about many myths that people believe but shouldn't.

John Balsam: I do pretty well on aerobics, but don't go to the point of "failure." Is that enough?

Chris: Some people can do this while gardening. You can also use elastic therabands. If you're around the house, you can use hand grippers or weights. Some use handgrippers for arthritis. You can lift weights.

Someone mentioned: I like to use the elliptical weight machine where there is a TV present.

Chris: Exercise equipment is so boring, but I go to classes at the Y. People who are more like me are there. Younger people don't tend to appreciate warm-up or cool down phases.

John Balsam: I tend to not do this.

Betty Molloy: What else for arthritis do you suggest for those whose joints are becoming increasingly problematic?

Chris: Berries - colorful fruits and vegetables with antioxidants and anti-inflammatory properties. Some cases are fickle, they come and go. Some use glucosamine-chondroitin, but

research is a little disappointing on it. You can try it for six months - during which time you take it every day - to see if it might help. I had hip replacement six years ago. Tried everything to avoid it but eventually my hip began "pissing off my back."

Anne Richards: What about the use of a product known as "barley green" for arthritis? My husband's mother used to say it helped her.

Chris: I've never heard about it.

Missy Cody: I haven't heard about it either, but maybe it has some fiber content that was of value.

Kathy Tomajko: What about repetition of exercises. Can you do too much?

Chris: You only need about 10-12 reps and then take a break. And do three sets of that, especially if you move from machine to machine, unless your goal is to be a body builder. Doing more can lead to injury. And it can take longer for you to come back after an injury.

Mitch: You mentioned that you should distribute your protein intake throughout the day. How many items might you have to eat to get 25-30 grams of protein at each meal?

Chris: It's advisable to get about 1/3 of the overall amount of protein needed at each meal. You can do this at breakfast with eggs, cereal and milk, toast and peanut butter. Or you can eat 7 grams of protein per ounce of meat with 4 oz of cheese.

Mitch: I notice you're wearing something on your wrist. Do you find it useful?

Chris: It's my Fitbit. I used to go 10,000 steps/day, walking 5 miles per day. You can set it to give you notice every hour if you've been sitting. I can exercise early and then sit in front of my computer all day. It reminds me not to do this. At a national meeting a couple of weeks ago in the Netherlands, it was mentioned that people who were aging were selling multi-story houses to move to homes all on one level. That is not a good idea. Stair-climbing is good exercise.

John Bugge: What about turmeric? What do you think of it?

Chris: It has a lot of promise. You have to eat a lot of it, though. There's a chart in the back of my book about popular dietary supplements - which have promise and which don't. There is a lot of garbage out there.

John Balsam: Should we take COQ10?

Chris: This would be good if you're taking a statin drug. It is not necessary if you're not. I myself don't like fatty fish - such as salmon or herring. So I don't get enough Omega 3. As a result, I take a 1200 mg fatty oil pill that's distributed between EPA and DHA. Flaxseed oil has ALA amino acid, but only a small amount of it converts to EPA and DHA.



Carol Braun: There's fish oil and krill oil. The latter is more expensive. Do you have a recommendation about which might be better?

Chris: You can take either one. Perhaps you can get a senior discount?

Joyce Swofford: What about Juice Plus?

Chris: I'm not a big fan. They make claims about this but I've not seen compelling research to support them. One ad mentioned that in 1 scoop you get 50 fruits and vegetables. I don't believe you're getting all the other things that are lost when you process things into powder form.

Carol Pope: Is your book available in Kindle or e-book form?

Chris: Currently it's only available through the Eat Right press bookstore in a downloadable form. It is available through Amazon now. Commercials for it will run next week.

Missy Cody: More information is available on Chris' free blog or on her website: [chrisrosenbloom.com](http://chrisrosenbloom.com)

Carol Pope: The USG has a Health Trails Challenge program now. Are you familiar with it? [See more on this on p.11 below]

Chris: No.

Dave Ewert: I understand that falling is about as risky as a heart attack for some folks as they get older.

[Editorial note: I missed some transition statements here.]

Chris: There are some free apps for meditation, such as Head Space. This is guided meditation and it is advertised through AARP. For me, when I do yoga, this is the only time my mind is not racing about chores or tasks I have yet to do. Yoga is good for balance, but there are other exercises you can do, such as standing on one foot with your eyes closed and see how long you can do this without falling. See also the National Institute on Aging for exercises that can be done using a chair to improve balance and prevent falls.

Dorothy Zinsmeister: Say something about aerobic exercising in the water.

Chris: A lot of people like this. I've never done it.

Dorothy Zinsmeister: I do. It's fabulous. It's hard work doing these things in the water.

Daniel Hagan: It should be water anaerobics. Might help with muscle soreness.

Ron Bohlander: A lot of people with arthritis focus on water aerobics.

Dorothy Zinsmeister: When you do balance exercises in the water, when you fall you don't break things.

Chris: Some do balance exercises on a board in the water.

Joyce Swofford: Say you do aerobics and strength exercises. Is there a preferred order?

Chris: It doesn't really matter. If I go to boot camp for a high intensity yoga program, it's nice after that to do something more relaxing.

Betty Molloy: What about cholesterol? I'm told not to eat too many foods with high cholesterol in the morning.

Chris: I think cholesterol in food has less importance than fatty foods. There is cholesterol in an egg. But half of its protein is in the yolk, where all the good stuff is.

Helen Brown: Some people have to reduce food intake to avoid acid reflux. Do you recommend any protein for someone in that fix?

Chris: I don't know. Missy - do you?

Missy Cody: No.

Dorothy Zinsmeister: Cider vinegar has been around a long time. There are all kinds of claims for cures it can bring about. I know of no empirical evidence myself. What's so amazing about it?

Chris: Claims for it come and go.

John Balsam: What about coconut oil?

Chris: Why would you put this in your coffee every morning? Those who are part of the Heart Association say people should get off it because it's a saturated fat.

Joyce Swofford: What about drinking water?

Chris: It's the best beverage we can have.

Joyce Swofford: How much is good?

Chris: It depends on the amount of exercise you do. Most get water in coffee, tea, foods. A quick test is whether you urinate throughout the day. And if it's a light color that's good. If it's a darker color, you're somewhat dehydrated. You should be drinking water throughout the day.

Joyce Swofford: A friend who has had cancer was told to drink a lot to flush toxins from her system that were associated with chemotherapy. Wouldn't that bring about a negative effect by flushing the chemo from her system?

Chris: I don't know. But when you're on medications, you need to have plenty of fluid to flush out the by-products of the medications.

Carolyn Derden: Does your book address anything about memory and aging?

Chris: Just a little bit.

Carol Pope: The University System of Georgia is very intentional about promoting wellness. They have instituted a Health Trails program. You can find more information about it under Human Resources at the USG website. It encourages teams to form on each campus and compete against other colleges and universities across Georgia. You have to sign up to participate. It is designed to track steps walked, water consumption, sleeping well, and kindness. This semester it has added a focus on financial knowledge. Each semester it changes. They don't intentionally put retirees in the system, but you can get in if you want to. Our retirement association created a team of 7 individuals - and we did not come in last. It's another way to maintain health.

Dorothy Zinsmeister: Every campus has a wellness center but it is designed for active employees. But if you go to ask about how retirees can be included, you can be invited. I suggest this.

Helen Brown: It's also good to participate in Senior Centers.

Mitch Clifton: At UWG we were able to convince our administration to grant free membership for use of our university's gym facilities to retirees. We sent a letter requesting this and after a couple of months they came through and let us do it.

4. **Next Meeting for GA-HERO.** Dave Ewert mentioned that GA-HERO typically meets 2-3 weeks after the USG Retiree Council meeting takes place. The organization has enjoyed the welcome it gets on different campuses around the state. It has held meetings in 7 places thus far. Dave encouraged any campus interested in hosting one of its meetings to let him know.

LUNCH BREAK

#### 5. **University System of Georgia Retiree Council (USGRC) Report**

Missy Cody, current chair of the USGRC, mentioned that minutes from the USGRC meeting held November 3, 2017 should be available about a week after Thanksgiving. They are currently going through an approval process.

Three major things were dealt with at the meeting held on November 3, 2017:

- a. **Healthcare.** Representatives from the Georgia Health Policy Center at Georgia State University provided a perspective on healthcare in a state-wide context. Representatives

from Aon Retiree Health Exchange, a sales group, addressed insurance matters. And Karin Elliott and Monica Fenton who work with Aon and other types of compensation/benefits for faculty and staff (including retirees) also participated.

A roundtable was held to answer questions the Retiree Council had solicited over the previous month and during the meeting. Given the participation of so many in the discussion, what one person didn't know, another did.

**b. Communications.**

For this topic the focus was on OneUSG, a system that is going to be the hub of the University System's payroll, grants recording system, and communication. It's especially important for retirees who have vision, dental, or life insurance through the USG. OneUSG is where they go to register and pay for these. It's also necessary for individuals to check in to be sure that accurate contact information for them and their beneficiaries is recorded there.

In the future, more communications will be coming from OneUSG and less from the HR offices on individual campuses. So it's important to be sure information in that system is correct. The HR office at the System level is trying to contact all retirees to insure that they register with OneUSG. A list will come out soon of those who have not yet made the transition, in the hopes that we can contact our former colleagues and friends and explain the importance of becoming a part of the OneUSG system.

Fred Ware: There are two kinds of insurance I've heard about: One is healthcare through Aon. Others have to do with vision and dental. But I got an email that makes it seem as though both come from Aon.

Missy Cody: OneUSG provides you with a link to Aon.

Anne Richards: What is especially confusing to many is that Aon handles retiree healthcare, but it also provides the administrative infrastructure for the OneUSG system. These are two separate entities in their company, however.

**c. Directory of Retiree Skills.** When the USGRC was established, the Board of Regents asked that it develop a directory of retirees in the state who might be called upon by various institutions in the USG (or the System office) on an as-needed basis. Missy explained that this is a project that is expected to take some time before it's completed.

Missy also reported that by April, she and Dorothy Zinsmeister hope to have assisted the USG HR office in the development of a **pre-retirement on-line brochure** that will be posted on the OneUSG website. Its existence is expected to make it easier for those who are making the transition to retirement.

Ron Bohlander: When is the next meeting of the USGRC?

Missy: We don't know yet because we are trying to find a time when the new Vice Chancellor for Academic Affairs (Tristan Denley) can attend and we are waiting to determine whether the meeting will be scheduled in Atlanta or elsewhere as a result.

Fred Ware: What about the future beyond next year? Is there any hope the USG will raise the amount of the HRA for retirees?

Missy Cody: The USG will review the situation every year to determine what it will do. Retirees should not save their HRA for a "rainy day," however. It does not operate like a savings account. Your family members will not inherit your HRA. They will have six months to pay your medical expenses out of whatever remains in the account, and then any balance goes back to the Board of Regents. A lot of retirees have spent nothing from their HRA. But when the Total Rewards Steering Committee and the Board of Regents look at the actual cost of medical care they have to support and where we are in various stages, it is not to our advantage to have large sums of money left in our accounts.

The second most expensive area for premium costs in Georgia is in the Albany area in southwest Georgia. In Atlanta, premiums cost half of what people in southwest Georgia pay because of all the hospitals and doctors in Atlanta. People who are older are paying more for their insurance. Some in their mid 60s are paying a lot. We don't expect there to be an increase in the amount of the HRA. Just as is the case for active employees, we will continue to figure that out every October when open enrollment comes around.

Fred Ware: I worry we'll be stuck with much higher costs for healthcare.

Missy Cody: Karin Elliott stressed at the last USGRC meeting that the USG made an effort to provide a "very generous" benefit for retirees when the first year transition to Aon occurred. And they have maintained it at that level since. They know premium costs are going up. There are no guarantees the HRA will go up and no reason to think it will go down. The matter is acted on at the August meeting of the Board of Regents. What can we do until then? Wait.

Dennis Marks: Decisions made by the Board at the August meeting are actually made earlier. So we should give input at the Spring meeting of the USGRC about matters of concern to us.

Missy Cody: They already know premium costs will go up in an uneven way across the state and across age groups. But that doesn't mean there will be a range of HRA's. Right now the amount is the same for everyone.

Betty Molloy: When I've gone into Aon, I've seen that the premiums will go up.

Ron Bohlander: Medicare sets those rates and then insurance carriers may do something new in response.

Missy Cody: You should get a notice in the mail about any changes in cost. If the policy you have has changed, your individual carrier is responsible for notifying you of the changes.

Someone asked: And this is also on the website for Aon?

Missy Cody: We have asked for this, but trying to get things updated on Aon is a moving target. We are not the only people eligible for the products it sells. If you don't find what you need on line or get an accurate response, call your Aon adviser.

Dennis Marks: Aon still has some 2017 rates on its website instead of those for 2018. You have 60 days from the time you sign up with a product to make any change. If you have questions of Aon and don't hear back from someone there, do not let them get away with not calling you back. Check again and ask someone else at the organization for assistance.

Betty Molloy: Can they change your premium after open enrollment?

Dorothy Zinsmeister: In mid-year there can be a change in premium. The formulary for your prescription drug plan might also change, and this might result in a change in your costs for prescription drugs.

Daniel Hagan: Learning that you shouldn't save your HRA money is a big wake-up call. If I were to take this information back to our retirees, what are the deadlines for turning in receipts? I couldn't excavate this from the website.

Missy Cody: Check with your Aon representative. I'm not sure you can be reimbursed now for expenses you accrued in 2015. You should also know that when flyers say that if you want to stay with your current plan, you don't have to do anything during the open enrollment period, this doesn't mean that your existing plan remains the same in the coming year. It isn't necessarily the "same" plan from year to year (with regard to premiums). If you aren't already doing this, you might look into having your premium paid automatically from your checking account.

Helen Brown: How long will the HRA last if it is rolled over and I don't spend what's in it?

Missy Cody: As long as you are alive plus six months. And say your HRA account is wiped out in November, any December bills you submit will come out of your 2018 HRA in January. It's important to keep this in mind. So if you go over your HRA in costs during the course of one year, it will be covered in the next year. But if you want to claim these expenses on your taxes in 2017, don't submit them to Aon. If you submit them to Aon, since you will be reimbursed in January of 2018 it's not legitimate to claim them as expenses in 2017.

Helen Brown: I was asked: Do you want to limit the amount you get per month from your HRA? I said yes.

Missy Cody: If persons enrolled in the supplement plan F or the hi-value supplement plan D, they will run out of HRA before the end of the year. They may choose then to have it come directly out of their personal checking account.

Helen Brown: If you are over 75, you will run out of your HRA before the end of the year.

Dorothy Zinsmeister: I want to say something about the issue of hoarding your HRA. The BOR gets back from Aon a whole slew of data about us. This includes who is running out of money,

what we are spending it on, etc. Currently we have some retirees who have \$5000 to \$6000 in their HRA. When members of the BOR see that, they believe the USG doesn't need to give retirees money for their healthcare - because they are not spending it. So it behooves us to use some of that money. Keep in mind that some think there's the potential for a serious issue that will come up later if the HRA money is not spent. It's not like a savings account, anyway. You get no interest on your HRA.

Your HRA money comes from an allocation from the Georgia Legislature through the budget ask from the BOR. The budget ask from the Legislature is for active employees and retirees. If legislators say no, they will not give the BOR more money, and the BOR will have to take money from the allocation it has to cover its various expenditures. And premiums will go up regardless of who you are. Aon covers retirees from all over the country.

Missy Cody: Part of what is covered in our insurance is the Catastrophic HRA. This is very important to some of our colleagues who come out of the donut hole and can have everything covered for the rest of the year. If colleagues have very expensive medications (such as for Hepatitis C or some forms of cancer), be sure they know to contact Aon. And they are informed of where they stand in this regard through quarterly Medicare forms. Once they see they are out of the donut hole they should immediately notify Aon. The paperwork is a bear, but you get full reimbursement when you complete it, so it's worth it.

Ron Bohlander: Keep in mind that the Catastrophic HRA is separate from the regular HRA.

Missy Cody: My email is [mcody@gsu.edu](mailto:mcody@gsu.edu) if you have additional questions. And I wish you all a Happy Thanksgiving.

## **6. UPDATE - Report on 2018 AROHE Conference in Atlanta, GA**

Dave Ewert introduced John Bugge as one of the founders of the Emeritus College at Emory, as well as one of the founders of GA-HERO.

John distributed copies of a preliminary draft of the brochure to be distributed for the 2018 AROHE Conference [See Appendix A]. He cautioned that those receiving this draft should understand that this is a draft in many different senses, including the fact that no payment has yet been made for inclusion of the photos now in it. The AROHE meeting will take place October 7-9, 2018 and it is the 9th biennial conference for that organization. John explained that the budget for the meeting is still being put together, so registration fees are not yet listed in the brochure. The planning committee is trying to keep costs down so as to attract as many attendees as possible. The meeting was previously held in the summer months, but it was decided that better weather is likely in Atlanta if it is scheduled in Fall. Along with Emory's Emeritus College and Emory University, GA-HERO is one of the co-sponsors of the meeting. John informed the group that he is also head of AROHE's Planning Committee for the conference. There are 18 members on this committee, including those from out of state and from AROHE's national headquarters. Missy Cody is Co-Chair with Dorothy Zinsmeister of the "Monday evening Committee" and Dennis Marks is a member of the Program committee, co-chaired by Gretchen Schulz and Kathy Tomajko. Marilynne McKay (who was ill and could not join us today) is

Chair of the Publicity and Engagement Committee. She is responsible for the layout of the brochure.

John explained that the first AROHE conference was held in 2002 at USC, where the organization originated. It was held in 2016 in Seattle. At another meeting, which took place at Wesleyan University in Connecticut, John met Dave Ewert. The last time the meeting was held in the Southeast, it was located in the Durham/Chapel Hill area. John said the Planning Committee has received commitments to attend the 2018 meeting from retiree organizations in Florida, Georgia, Tennessee, and the Carolinas. The Publicity and Engagement Committee will send letters to Provosts and Presidents, HR administrators and Development officers throughout the southeast and hopes they will send representatives to the conference. John expressed the belief that this will be a very exciting conference nationally.

He explained that the Monday evening event being co-chaired by Missy Cody and Dorothy Zinsmeister is an "Atlanta Dine Around." Groups of 4 or 8 or 12 will go to the same restaurant with a member of GA-HERO or Emory serving as the driver. Restaurants in Decatur, the Emory area and the Buckhead area will be chosen as destinations so visitors not from the Atlanta area will have the opportunity to get a taste of the Atlanta scene.

An Atlanta Arrangements Committee has scheduled an event for those coming into the city by Sunday morning. The signature event will be a visit to the Atlanta Civil Rights Museum followed by lunch at Mary Mac's Tea Room (known for its southern-style, down-home cooking).

The main business of the Conference will be the program - currently being planned by Gretchen, Kathy and Dennis. They have solicited input from retirees about what they would like to see covered at this meeting.

Sunday, there will be an Open House for those registering and arriving, to make them feel welcome. Sunday evening there will be a banquet on the Emory campus.

Plenary addresses will be given by

\*Steven Tipton, Emeritus Professor of the Candler School of Theology. With the help of a Guggenheim grant, he has been writing a book on retirement in America which is coming out in 2018.

\*Roger Baldwin, from Michigan State University. He is knowledgeable about academic retirement and has PhD's working for him who have compiled data on the subject in the US.

There are two Committee of the Whole sessions highlighting AROHE's role as an organization. There will be 9 breakout sessions with three concurrent sessions in each block.

Three will be held in the morning on Monday, and three in the afternoon on Monday. Two will be held on Tuesday. Keynote speakers, concurrent sessions, plenary panels and a Resource Exchange Fair will focus on three primary conference themes:

1. Opportunities to CONNECT: What Retirement Organizations do for their members.



2. Opportunities to SERVE: What Retirement Organizations and their members do for their institutions and those in the wider community.

3. Re-Creating RETIREMENT: What AROHE and regional consortiums do to help retirees Connect, Serve, and Celebrate.

Nine topic areas will go live on the website in early January. Once the website goes live, it will also provide opportunities for those who want to propose a presentation of their own. Sessions will be 75 minutes long, including three 20-minute presentations, with 15 minutes for dialogue and discussion. John explained that, as he sat here this morning listening to Chris Rosenbloom, he realized there should be a session on living well, moving well, and eating well.

John mentioned that the Emory Conference Hotel has been "wonderful" to work with on this project. A reduced fee for lodging was arranged through the Provost's Office at Emory University. And this rate holds three days before and three days after the Conference takes place. He requested that those attending today's meeting talk to those in their own retiree organizations and encourage their involvement in the Conference. He has found attendance at AROHE meetings "really exciting" and believes the one in Atlanta will be among the best. If persons are interested in what happens to academics after they retire, they can get practical ideas of what can be done to make individual retiree organizations better, more effective, and more useful to their members. Sessions will also address what universities can get from their retirees and share ways in which retirees give a lot back to their institutions. John encouraged individuals present at the meeting to bring their Provosts, Presidents, HR officers, and anyone else they believe could benefit from the meeting.

Fred Ware: Do spouses have to pay separately to attend?

John Bugge: All rooms are for double occupancy and the rate will be \$179/night. There will also be a fee for attending the Conference (likely about \$275) but spouses are not expected to pay for that. Details about cost will be known by January 1st.

Gretchen Schulz: For the Sunday event at the Civil Rights Museum, anyone can sign up and pay to participate in that. There will be lots of options for partners.

Fred Ware: It would be good if the brochure said bring your spouse.

John Bugge: We'll make sure it's on the website or the brochure.

Fred Ware: And what about a spouse who wants to go to the banquet?

John Bugge: There will be a separate fee for that. We're still working on the budget but we wanted you to have this information now so you could be thinking ahead and planning to attend.

Kathy Tomajko: And you want people to volunteer for the dine-around?

John: Yes. We'll have a place on the website for signing up for this.

Gretchen Schulz: There will also be volunteer opportunities for those willing to help with registration as well.

Dennis Marks: This is a wonderful opportunity to engage our retiree organizations in learning what other retiree organizations are doing. It gives us the opportunity to consider doing more on our campus. I'm glad GA-HERO is a co-sponsor.

Joyce Swofford: If you volunteer to assist in some way will part of your registration be waived?

John Bugge: We still don't know the answer to this question.

Betty Molloy: What was the registration fee in the past?

John Bugge: It was \$260 in Seattle. But the hotel there cost \$219/night.

Gretchen Schulz: Individuals should keep in mind that registration at the hotel will include taxes beyond the base rate of \$179/night.

John Bugge: I can attest to the fact that you will get a lot out of going to this conference.

Dave Ewert: I've been to three AROHE conferences and I never remember anyone saying it was not worthwhile.

## 7. **Best Practices.**

Dorothy Zinsmeister invited those in attendance to share "best practices" their retiree organization has identified. [NOTE: Documents distributed at the meeting by Emory University's Emeritus College, Georgia Perimeter College and DeKalb College Retiree Association, the University of West Georgia, and Valdosta State University can be found in Appendix B].

**Clayton State University:** Jim Braun said he planned to share what the retiree organization at Clayton State University (CSU) does well. It holds three meetings a year. At the one in May, a special luncheon is held to honor new retirees. Efforts are made to pair retirees with a partner so they can attend the meeting. In the fall, a benefits meeting is held with the HR Director at CSU so retirees can get answers to questions they have about benefits. In February, a presentation is arranged with a speaker who can both entertain and give the group great information. Retirees also share lunch at that time. One program was on the trek a faculty member made across the entire Appalachian Trail (in a couple of months). Another involved a "Second Wind Talk Show," focusing on what people could do after retirement, e.g., what hobbies, second jobs they had. The host of this program interviewed retirees about their activities. Some retirees at CSU are bike riders and they talked about the foibles of going to different places to bike. The retiree association at CSU also has a regular monthly breakfast club. The location for this varies and typically about 8-12 retirees attend. Once a month, their retiree organization organizes a Book Club. Retirees read a particular book and then meet to discuss it.

**Columbus State University:** Dutchie Riggsby reported that the Columbus State University retiree group is "just getting cranked up." Bylaws have been approved. They are collaborating with persons in the library on campus as several retirees once worked there. The issue of allocation of space has come up. They have an email directory with 200+ retirees in it. They will be working to build their email listserv through the university.

Dorothy Zinsmeister: A best practice is to get retirees to keep their campus email address.

Dutchie Riggsby: Many may need new addresses because they had to give up their campus email address when they retired.

**East Georgia College:** John Derden reported that this institution has only 20 retirees. It has just been open 45 years. The retiree organization has a list of retirees and has occasional meetings. He, himself, is the last original faculty member who worked on that campus. They talked about having a formal retiree organization a couple of years ago. At that point, however, there was no interest in this. Carolyn Derden added that since the change in insurance occurred for retirees, the administration has held meetings (where food is served) to provide information to retirees.

**Emory University:** Gretchen Schulz reported that a best practice and their "most thriving" program at Emory has been their Speaker Series/Luncheon Colloquium. (See Appendix B-1). Two are held each month at lunch time, except during the month of August. If they choose to do so, individuals can purchase lunch (which consists of sandwiches brought in from Publix with chips and cookies). Gretchen and a colleague handle the scheduling and primarily seek "active," i.e., currently employed faculty as speakers. Gretchen said she actually finds use of the word "active" in this sense offensive because so many are still quite active in retirement. Not all speakers come from Emory University. Some came from Spivey Hall, Mercer, etc. Those planning the series are open to a wide range of ideas. About 40-50 people attend. When the program began six years ago, they averaged 15-20 in attendance, but the popularity of the program has been building over time.

Gretchen explained that this type of program is easy to do. It involves two people (one doing the administrative work full-time, another half time). Otherwise, it involves volunteers from the Emeritus College. Speakers can be recruited via email. No money is paid to them. Those participating as presenters enjoy doing it for free because the group is so lively in terms of questions asked and comments made afterwards. Speakers appreciate the opportunity to engage the group. So no money is needed to carry this type of program off. All that is necessary is a space to hold the program, preferably where parking is easy for attendees. And yet the "bang for the non-bucks" is enormous.

In addition, the Emory group has organized an interdisciplinary seminar in which 12-14 participate. The last one was organized around the book *Behave: Humans at Our Best and Worst* by Robert Sapolsky. This also, is easy to do, and a "terrific" experience, giving retirees the pleasure of being a student again, in an interdisciplinary context. Beyond this, to add to what Chris said about the importance of a social support group, these activities are building community. All who attend are happy to be there. They see their "friends" there. Sometimes they never met fellow-attendees associated with Emory when they were working, but can now engage in "wonderful conversations" with them.

**Valdosta State University:** Dennis Marks explained that his best practices story (see Appendix B-2) is actually a GA-HERO success story. A couple of years ago, at a GA-HERO meeting, representatives from Emory University shared a copy of a "Steps to Retirement" brochure the Emeritus College put together for prospective retirees. The VSU retiree organization took this back to their HR Department and asked if it might be willing to produce something like it. Their HR Department agreed to do so and printed them. Flyers were also printed and posted in offices informing faculty the brochures were available. Following this, Dennis took the VSU brochures to the USGRC meeting and inspired both Clayton State University and the University of West Georgia to create brochures of their own while Missy Cody and Dorothy Zinsmeister approached the University System HR office about working on a system-wide brochure. The latter will likely be available by March, 2018.

In light of the above, Dennis emphasized that GA-HERO is an important resource and a significant venue to spread the word about good ideas and he thought the AROHE meeting would be also. Dennis also stressed the importance of retiree organizations reaching out to pre-retirement faculty. To do this, retiree organizations have to get contact information on faculty and staff so when they do transition to retirement they can be informed that there's life on the other side and have a well-thought-out transition. On the VSU campus, the HR office conducts a pre-retirement seminar, and the VSU retiree organization is a participant in this.

**Georgia State University:** Harry Dangel said that he thought what Georgia State was doing might fall short of "best" practices, but he considered some to be pretty good. The group initially centered its programs around themselves, arranging informative sessions with faculty authors. More recently, it has expanded its focus and is looking at how to give back. It has supported a program for students in the Honors College, providing funds for 10-12 students to go to conferences, secure internships, and become part of professional organizations. Retirees did this for current students because, once upon a time, others had done things like this for them. They have had some good success in a request to have departments list Emeriti faculty on the departmental websites. Once some began doing this, others saw it and now almost 100% of departments do this.

Another way the group looks at reconnecting and giving back is making sure department chairs and faculty are aware of the existence of the Emeriti faculty in other ways. Some might help new faculty with their teaching, e.g., looking over their syllabus, providing feedback on their exams, observing their class, talking with students who might benefit from interaction with an older person, assisting with proposal writing and giving guidance on various other professional matters. They weren't sure what this means of becoming a more active part of current University operations. Doc in the Box, Cup of Joe, Drive by Schooling, were among proposed titles mentioned.

**Georgia Perimeter College of Georgia State University.** Bob McDonough reported that Ted Wadley will be replacing him as the President of this retiree organization. Their organization meets quarterly and has taken field trips as a group. They also hold one meeting a year focused on benefits, which attracts the largest amount of attention. The group sends out over 500 newsletters a year, and each one includes a plea for accurate and updated information about a person's email address. At this time in the merger of Perimeter and Georgia State, the Georgia Perimeter group is still having a lot of problems getting email addresses, but they are working on building their email list. No one retires from Perimeter College any longer. Georgia State's

Emeriti faculty and Perimeter now have separate but equal organizations. Overall, however, the one at Perimeter College is thriving and doing well. [See Appendix B-3]

Betty Molloy added that the Emeriti faculty at Georgia State University warmly welcomed the Emeriti faculty from Perimeter College and invited them to become Board members. The problem now is figuring out how to allow some other retirees to join the GSU organization.

Dorothy Zinsmeister noted that mergers have created several problems for retiree groups.

**Georgia Tech:** Ron Bohlander reported that Georgia Tech has a combination of missions. There are some things they do and do well. But he thought that there are some things just starting that attract a small number of respondents now which may constitute a core group that will put together a prototype of a potentially great idea that could be shared with GA-HERO in the future. He also emphasized the importance of collecting email addresses. This enables the group to inform constituents about program ideas or to provide information about something important to them, as benefits. Persons active in the retiree association sometimes know more early on than is known at the HR office. Also, retirees can often express what is known more quickly and more clearly. This can help retirees understand why they should want to grow their organization. A lot who retire move to where their grandchildren are living, but they still want to stay in touch with their former institution.

Ron also mentioned that, if you have a few hundred persons in your email list, simply using the blind copy tool might result in those emails going into Spam. A free tool, known as MailChimp can help avoid this problem. He invited those who don't know how to arrange for use of this tool to let persons at Georgia Tech know and they will provide assistance.

The retiree group at Georgia Tech, known as the Silver Jackets, holds a colloquium once each month, focusing on the latest research in some area. They often invite speakers who have presented at the GA-HERO meeting for these colloquia. This is beneficial or worthwhile if only 40 out of 600 people attend. It is in this face-to-face contact that there is power in relationship. This is where the Silver Jackets find their next set of leaders. They have a full line of succession present at today's meeting and feel blessed for this. People attending these meetings can see you are in a position to be an advocate for them and help represent what retirees are worried about.

One last tip Ron provided was to consider thinking about an interesting name. Most retiree organizations have names that are "a little blah" in comparison with Silver Jackets.

Kathy Tomajko added that the Silver Jackets met with their HR representatives and were invited to make presentations to them at their monthly meetings. They have also met with their Development personnel. A retiree dinner is given for retirees by the University, but there are ways the Silver Jackets can connect with more on campus for the benefit of retirees.

John Bugge: The change in medical insurance for retirees at Emory was "tortuous." In the midst of it all, one member of the Emeritus College, a medical doctor, wrote out a description of what the change meant in clear and simple English. This was sent out by the retiree group and "we were loved for it."

Carolyn Derden: In 2015 we went to meetings with Aon. Some retirees were very anxious about this transition. I thought Emory Hospital provided insurance for Emory retirees.

Anne Richards: My understanding is that Emory University hired a company similar to Aon for insuring its retirees with healthcare coverage.

**Kennesaw State University:** Carol Pope explained that the retiree group at Kennesaw is known as the Golden Owls. They have grown since the consolidation took place between Kennesaw State University and Southern Polytechnic State University. The group is affiliated officially with the Department of Development so one of their official functions is raising money. They have raised money for scholarships. About 2 and 1/2 years ago they formed an endowed scholarship, which was to be endowed at \$20,000 within 2-3 years. They raised that amount of money in 15 months but have not yet given out the scholarship. They are waiting until the amount it earns is a reasonable amount to provide to a student. They solicited funds from retirees, held various events, including benefit concerts. They have established a clear link with their HR office. The Golden Owls group is the best way to reach retirees and retirees call those affiliated with the organization because it is known such persons can often provide answers they can understand better than the ones they get from HR. They go to the campus Benefits Fair every year. They do most of the work to recognize retirees and provide an engraved brick for each retiree (which is placed on the campus). In collaboration with their HR office, they stay in touch via an email list of 600 retirees. Carol said that, after hearing Ron's remarks, she planned to look into the use of MailChimp. About 130 of their retirees have no email address and information has to be mailed to them via the postal service.

To keep retirees connected to each other and the university, they have instituted a "Passports and Pastimes" program. Every two months they feature someone who has visited another country or has something interesting to share. For one of these programs (held in December) two persons who went to Antarctica for different reasons made a joint presentation. They do a wide variety of things to attract retiree interest, including workshops on computer security and a new campus email system. Every other year they hold a reunion, which is their "biggest event."

Dorothy Zinsmeister: Among the great ideas I learned at AROHE was establishing a faculty speaker series, a program where faculty talk about their research. We are now working with the Provost and Grants office, seeking funding to offer small grants to retirees who want to conduct research. This could turn into an AROHE presentation if we're successful. You learn a lot at these meetings. It can take a couple of years to get something funded, however. But it's important to recognize that everybody doesn't like to do the same thing in retirement.

**Georgia Southern University:** Dan Hagan reported that an annual recognition of Georgia Southern University faculty and staff retirees, known as the Retirees Recognition Ceremony, takes place as an outdoor event each spring at the Builders of the University Terrace on campus. The ceremony honors those who have either retired since the last ceremony or announced their retirement in the current year. Each retiree is recognized by the President of the University and is presented with a bronze plaque commemorating his or her years of service to the university. In 1990, the president of Georgia Southern had extra money and created a "Wall of Honor." Hagan said he believes it should have been named "Builders of the University," but . . . it goes across the 100 years since the university began. All who taught and retired at GSU, back to his wife's grandfather, are honored. The President presides at this event. Each Dean presents the retirees from his or her division of the university. Each retiree also gets a crystal keepsake. Shortly thereafter a no-cost full meal hosted by the university is provided to every retiree. At the event, the university President provides a brief "State of the University" address with Power Point

slides of new buildings, academic programs, new initiatives, etc. Then the executive council of the retiree organization holds a retiree association meeting elsewhere in the building. Some meet, eat, and don't come to this organizational meeting.

Dan also stated that he felt it was a privilege to be able to attend today's meeting of GA-HERO and to hear best practices shared here. He thanked the group for this.

**University of West Georgia:** Mitch Clifton explained that Anne Richards and others had worked with the HR office at UWG to develop and produce a one-page "Steps to Retirement" brochure. [See Appendix B-4] In discussing how to get this out to existing faculty once it was available, it occurred to him to ask HR about the possibility of the UWG retiree association participating in the annual Benefits Fair. The prospect was warmly received and several retirees took turns staffing a table at this event. It turned out they were busy during the time it took place. They passed out the brochures, along with copies of the Tribute Booklet prepared to honor retirees each fall (copies of which were available at today's meeting). As a result of this participation, more faculty and staff now realize the UWG retiree organization exists and the interaction also prompted others to work in collaboration with us in the future. In addition, our HR office is now handing out these brochures at their events.

Given the comments regarding exercise during Chris Rosenbloom's presentation, Mitch also mentioned that the Coordinating Council of the UWG retiree organization asked the administration last year to grant retirees free membership for use of the exercise facility on campus. The initial response was that the administration would consider it, but inquired if the group had done a survey of retirees regarding the use of this facility. This had not been done, but the Coordinating Council soon put together a survey and got about 1/3 of those receiving it to respond. 40-50% of respondents said they might use this facility if given a free membership (which ordinarily would cost retirees \$100/semester to join). Survey results were sent to the President and Vice President and eventually word got back that retirees would be allowed to use the facility for a one-year trial basis. Nine retirees have signed up for this now and the UWG retiree organization can advertise it as a retiree benefit.

The UWG retiree association also puts together a Tribute Booklet for our annual reunion, in which we honor retirees (both faculty and staff). Anne Richards, Martha Ann Saunders and others do most of the work on this. They get persons to write a summary of each retiree's contributions while employed at the university and a copy of the booklet produced is distributed to all at the annual retiree luncheon the group sponsors in collaboration with personnel in the Development and Alumni Relations office.

Dorothy Zinsmeister: This is a very thick booklet. How many retirees do you typically include in it?

Anne Richards: When we first created it, we had about 15 people retiring each year. This year we had more like 30. So it's grown. And we understand there will be about the same number of retirees for another year or so before it drops back down again. In the earlier days we could printed a cover using color and there was no limit on the number of pages that could be written about a given retiree. When the economic downturn occurred, we were told we had to shift to a black ink cover and it hasn't changed since then. Also, because our booklet includes both faculty and staff retirees, we noticed early on that some write-ups were considerably longer than others.

Mostly for economic reasons, but also to achieve greater balance in length of the write-ups, we subsequently adopted a policy where each retiree's write-up could not exceed one page in length.

Dorothy Zinsmeister: At Kennesaw State University, we require a student to do outreach at the Exercise Center. Would you like to have a personal trainer? This is something to look into. It's not only a good experience for the retiree, but a wonderful experience for the student to get to know one of the retirees.

**Middle Georgia State University:** Laurie Shaw reported that MGSU doesn't have a formal retiree organization at the present time. She, herself, is newly-retired. One of the big challenges faced by MGSU retirees is fleshing out the identity of the institution since Macon State and Middle Georgia consolidated. The institution currently covers a "huge area" and is struggling to bring retiree organizations together. They have been affiliated under separate institutions. There is a small core number of persons who responded to a survey, and, with the help of the HR office, may get something going. Laurie said she was excited about how attendance at the AROHE meeting might be helpful to them. She also reported that her husband is going to retire from Fort Valley State University. And, since no one was representing that institution at today's meeting, she plans to put a bug in his ear about that. She said she also planned to look into attending AROHE and see what she can do for both MGSU and FVSU.

Helen Brown mentioned that when Clayton State University began its retiree association in 2002, they got the addresses of all retirees and sent out a letter stating that they were starting a retiree organization. If anyone was interested in becoming a part of it, they were invited to complete the form enclosed. A time scheduled for a Fall meeting was also provided. This worked pretty well. The letter went out to 60 people and approximately 30 came and met with those initiating the organization's development.

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Dave Ewert thanked all who had participated in this sharing and announced that Anne would put together the minutes for today's meeting and include with them copies of what had been provided by given retiree organizations as their "best practices." These will be sent out over email in the near future.

## **8. Closing Remarks**

Dave thanked Carol Pope for creating the name tags and name tents. He also mentioned that Clayton State University got recognition of its own retiree organization by sponsoring a meeting of GA-HERO. He explained that GA-HERO has been around since 2010. It meets semi-annually and no one has paid a buck for membership as yet. He encouraged retiree organizations to consider hosting a GA-HERO meeting as a way of getting recognition for their retirees. He announced that if a President or Provost is willing to provide a sponsorship for the meeting, the person could be given about 5 minutes to talk to the group about the school hosting the meeting. He reported that when the GA-HERO meeting was held at the USG, the Chancellor and Vice Chancellor of Human Resources at the USG level both came to the meeting.

Dave thanked all those in attendance today and asked that they pass thanks along to all their colleagues for making it such a successful meeting.



Lynne Bryan of Middle Georgia State University said she thought that the changes in insurance helped people become aware that having an organization that can help you in transitions like these could be something of great interest to retirees. She had been told about this group by Ellen Friedrich at VSU and said she understood a lot more today about a number of things regarding healthcare issues since attending this meeting. She said she would encourage this group to use a focus on healthcare as a way to communicate with and help others understand the changes. She thought this was less critical for a school like Emory or others that were not a part of the USG because non-members of retiree associations have more trouble with things in the USG than other retirees might at a private school.

Dorothy Zinsmeister: If you're starting an organization, remember that GA-HERO is a mentoring group. There are persons in this group willing to come to your campus and talk about different strategies for establishing a retiree organization.

Adjournment: The meeting adjourned approximately 2:05 pm.

Respectfully submitted,

Anne C. Richards  
Secretary