

## GA-HERO

### Georgia Association of Higher Education Retiree Organizations

Meeting held Friday, November 9, 2018

Donahoo Lounge in the Maxwell Student Union

Georgia College & State University, Milledgeville, GA

### NOTES

**Present:** Beryle Baker (Georgia College & State University); John Balsam (Georgia Institute of Technology); Ron Bohlander (Georgia Institute of Technology); David Boyd (Valdosta State University); Zandra Brasington (Georgia Southern University, Statesboro); Carol Braun (Clayton State University); Jim Braun (Clayton State University); Kelli Brown (Provost and Senior Vice President, Georgia College & State University); Catherine Carter (Georgia Perimeter College, Georgia State University); Bill Cody (Oxford College, Emory University); Missy Cody (Georgia State University), Gray Crouse (Emory University); Harry Dangel (Georgia State University); Robert DeLong (Valdosta State University); Dave Ewert (Georgia State University); Kathryn Grams (University of West Georgia); Daniel Hagan (Georgia Southern University, Statesboro); Judith Malachowski (Georgia College & State University); Dennis Marks (Valdosta State University); Marilynne McKay (Emory University); Betty Malloy (Georgia Perimeter College, Georgia State University); Carol Pope (Kennesaw State University); Anne Richards (University of West Georgia); Warren Riles (Georgia Southern University, Statesboro); Katherine Rodgers (Kennesaw State University); Gretchen Schulz (Oxford College, Emory University); Carol Thompson (Georgia Southern University, Statesboro); Kathy Tomajko (Georgia Institute of Technology); Ted Wadley (Georgia State University); Fred Ware (Valdosta State University); Martha Wicker (Clayton State University); Howard Woodard (Georgia College & State University); Dorothy Zinsmeister (Kennesaw State University).

1. Dave Ewert, President of GA-HERO **called the meeting to order** at 10:10 am and **welcomed the group** to this 15th meeting of GA-HERO. He announced the meeting was dedicated to John Bugge.

2. Dennis Marks introduced **Dr. Kelli Brown, the Provost and Senior Vice President of Georgia College and State University (GCSU)**. He explained that her Ph.D. is in Health Education, with undergraduate and master's degrees from the University of Toledo and Southern Illinois University respectively. She served as an administrator in higher education in Illinois and Florida before moving to Georgia. She was the Interim President at Valdosta State University in the Fall of 2016 and has focused on faculty and student success while at GCSU. There has been a 25% increase in the 4-year graduation rate for GCSU students since her arrival. She has also been instrumental in the creation of Center for Early Language and Literacy on the GCSU campus.

Dr. Brown welcomed the group of retired faculty and staff to GCSU, stating that she appreciated the value of having a group like this which brings "a lot of brainpower" to a room. In addition, she expressed appreciation for the experience and expertise of retirees in the Milledgeville community.

She explained that GCSU is the state's public college for Liberal Arts and was at one time the home of state government. It is the only university in the country that has a Governor's Mansion as a piece of the property on campus. The mansion has been restored to the 1865 period, and

several of the campus presidents have lived in it. In 2004 it was used only as an entertainment facility. In the past year, GCSU has also acquired Andalusia, where Flannery O'Connor lived (1951-1964). She also was employed at the university. Emory University is currently working on a documentary about her. Andalusia was gifted to the GCSU Foundation. This includes 498 acres of the Andalusia "Farm," and 38 acres which include the home, pond, and barns. These will be restored to the 1950's era, when O'Connor had a flare-up of lupus and came back from New York to write there. Dr. Brown went on to say that Milledgeville has also preserved the home of Sallie Ellis Davis, an African-American woman passionately committed to the education of blacks during segregation.

Brown then explained that she had been asked to speak at today's meeting about the Sandra Dunagan Deal Center for Early Language and Literacy. "Literacy changes lives," Brown stated. If you can't read or write, you have difficulties in our society. We all probably know folks who can't read or write or even sign their name. But the state of Georgia wants young children to be able to read by the third grade.

Sadly, only 34% of Georgia children can read at the third grade proficiently. And those who have difficulty reading are 4 times more likely to drop out of high school than proficient readers. Moreover, 2/3 of those who are not proficient in reading at the third-grade level will end up in jail or on welfare. And if they are not caught up on their reading skills by the 4th grade, they have a 78% chance of not ever catching up. 82% of Georgia children are at increased risk of failing to graduate from high school on time because they can't meet reading level proficiency by third grade.

"These are amazing statistics," Brown stated. And, given the challenges they represent, the Center was created in 2017 at GCSU by the state Legislature, with a statewide mission. Governor Deal maintained that he couldn't increase economic development in the state without a more-educated workforce. The Center was created to improve early language literacy skills of Georgia's children by providing research-based, professional development for organizations working with children from birth through age 8 in their families, schools, and communities. The focus of the Center for Early Language and Literacy has been birth to third grade. Those associated with the Center believe we can do better in this state and our children deserve better. Named for Governor Deal's wife, the Center reports to the Provost of GCSU. No other state has something like this in place with a statewide mission.

A national search was launched for a director of the Center who had the vision and expertise necessary to propel every Georgia child to read proficiently by third grade and beyond. Currently, educational systems are in place from Pre-K to third grade. But from birth to age 3 there are no similar systems. Various day care centers and preschools exist, but they may or may not be accredited. The State of Georgia put 2.7 million dollars into the Center its first year and has consistently done so since. The state and the Governor determined this was important. The Center opened in June of 2017 in partnership with the University, the Technical College's early childhood program, alternative educator preparation programs, and other public and private stakeholders. Governance responsibility of the Center is held by a Board of 9 persons appointed by the Governor of the State of Georgia.

The Center focuses its efforts on transforming the workforce that touches and interacts with early-age kids. Its core audiences are Early Childhood Education, birth to age 4; K-3 Education, Technical College, and University Education Programs; and Policy Leaders. A systematic approach is in place that requires cross-sector collaboration and a grant process is associated with it that requires communities coming together and pooling their resources. Libraries are partners as are Public Health and non-profit agencies. They share evidence-based research. One person involved is a neonatologist OBGYN as explorations are underway about how to start working with mothers and families prior to and after birth. The Center will partner with other institutions that do research and are known for work in this area, e.g., University of West Alabama, and Georgia State University. GCSU is a Master's Comprehensive institution but funds research at research universities and partners with clinical researchers. A professional mentorship program is in place. Get Georgia Reading is a partner. The Center aims to provide access to a research-based capacity for building professional educators, summer programs with early language and literacy development, literary materials, neonatal units, community-based college programs, libraries, the Governor's Office of Student Achievement, the Get Georgia Reading campaign, the Georgia Department of Education, and the National Alliance for the Mentally Ill (NAMI). Personnel associated with the Center work with the Georgia Department of Early Care and Learning (Infant and Toddler), Literacy mentoring for leadership professionals, Deal Center Summer Literacy Initiative mini-grant, annual Governor's Summit (June), and Collective Impact Grants for Early Language and Literacy. One research study is currently ongoing at Emory University. Again, the Center's vision is propelling every Georgia child to read proficiently by the third grade and beyond.

Missy Cody: Have you considered the possibility of partnering with the Women, Infants, and Children (WIC) supplemental nutrition program?

Kelli Brown: We're focusing on age 0-3 right now, but are looking to work with other organizations at some point in the future.

Ron Bohlander: What this center does is of considerable national importance. There is a great need for more professional development in early childhood professional workers. My daughter works in that arena but has a difficult time hiring those with adequate preparation for the job. Most who provide services in the preschool arena barely make a minimum wage. This makes it so hard to get capable workers. Too many lack education.

Kelli Brown: This is why we have organizations seeking funding for increasing their education.

Ron Bohlander: Case Western Reserve has a fine school of Social Work, but there are not many there who focus on the early years.

Kelli Brown: The numbers show it's a critical matter.

Kathy Tomajko: Are there national conferences on literacy?

Kelli Brown: The director of our center is not here today because she is at a national conference. She is co-presenting on work done previously that is informing the work we do here. It's an

international Literacy Research Conference. She will be publishing and presenting at other conferences as well. When I first heard of this work there were not that many working on these issues. Now more are doing so. When others hear of our Center they are amazed to learn that our Governor did this. In Wyoming, a center was also set up by the Governor in that state, but it does not have a statewide emphasis. I agree that it does have to be more widespread.

Dan Hagan: What a delightful breath of fresh air to hear about this. Our Governor (Deal) came from a family of teachers so he sees the importance of this. Our state has been known at times for being at the bottom from an educational perspective. This is a wonderful opportunity for the state.

Gretchen Schulz: Are you working with people in organizations working with the immigrant population?

Kelli Brown: We're still in the infancy stages, but are beginning to have these conversations. Even for those learning two languages at the same time, it's easier to learn to read earlier.

Attendee: It will be interesting to see where this fits into the ideas of the new Governor.

Kelli Brown: I feel confident personally that we have done some really good work and have been good stewards of the funds given to us. Right now this funding sits out as a line item. I hope it becomes part of the GCSU budget in the future. We have submitted our budget for 2020. Part of our goal is to write our own grants and contracts. That is why we are partnering with others to get grants.

Beryle Baker: I have been involved at GCSU in the recruitment of technical school education majors and have established the Baker endowment for the recruitment of teachers. If we can get them when they first come into education and support them in their careers, that would be ideal. You can make a tax-deductible contribution to that endowment. I've also been a volunteer in the State of Georgia prison system. There is a connection between literacy and incarceration as you said. Keep in mind, we pay for it at one end or the other.

Kelli Brown: At GCSU we have the "Call Me Mister Program" to recruit African-American males for early childhood education. It's currently the only program in the state doing this. We are helping young men become teachers in the hopes that they will return to teach in their communities.

Dr. Brown then thanked the group for the opportunity to meet with them.

### **3. Introductions.**

All those present (see list on p. 1) then introduced themselves to one another, providing their name, the position they held prior to retirement or are currently holding, and the institution at which they were/are affiliated.

### **4. Tribute to John M. Bugge (June 3, 1941 - November 5, 2018).**

Gray Crouse, a colleague of John's at Emory University shared the sad news that John, a

co-founder (with Dave Ewert) of GA-HERO, had died following a serious bicycle accident. Most of you knew John, he said, or knew of him, but might not have known that he earned his BA degree in English and Philosophy at Marquette University, was a recipient of a Fulbright award to study in Germany and a Danforth Graduate Fellowship. He received MA and Ph.D. degrees from Harvard University and retired as a Professor Emeritus from Emory University. He was a gifted teacher who won the Emory Williams Distinguished Undergraduate Teaching Award in 1985 and 1991 as well as a teaching award from the Residence Hall Association at Emory. He also received the Distinguished Emeritus and Service Award at Emory University in 2013 for fostering community among retirees. He was president of the Emory chapter of the AAUP, belonged to various scholarly organizations, and served on numerous departmental and college committees.

Along with Gene Bianchi, John was a co-founder of the Emory University Emeritus College (EUEC) and most recently served as Chair of the Executive Committee of the College. He was president-elect of GA-HERO (an organization which he cared deeply about), a leader of the interdisciplinary seminars EUEC organized, and he served on the board of the Association of Retiree Organizations in Higher Education (AROHE) for four years as well as on various committees of that association. He was loved by persons across Emory University and acknowledgment of his death in the student newspaper at Emory indicated the high regard in which he was held across the campus.

At the Emeritus College, he led a lunch colloquium on April 10, 2017 entitled, "Reinventing The Canterbury Tales: Hypertext and the General Prologue." (See Vol. 33, Issue 14). It is also available as a YouTube presentation.

His final legacy to the Emeritus College was related to AROHE. He was the first to suggest that the Ninth Biennial Conference of AROHE be held at Emory University. And it was his idea to have GA-HERO co-host the meeting. He was chair of the planning group and this conference is truly his final legacy to the Emeritus College.

His passions included anti-corruption and public integrity. He was a contributor to the Southern Poverty Law Center. A celebration of his life will take place at the Emory Canon chapel at some point in December. He is survived by his wife, Liza Davis and sons Stefan Bugge and Eric Emmons.

A sympathy card for John's family was circulated by Missy Cody at today's meeting for persons who wanted to send their condolences to the family.

## **5. LESSONS LEARNED FROM THE AROHE CONFERENCE (2018)**

Anne Richards, moderator for this segment of today's meeting, explained that she had never heard of AROHE until John Bugge and Dave Ewert talked about it at a formative meeting of GA-HERO. As she understood it, John and Dave met while attending one of AROHE's earlier meetings and were inspired to create a coalition of retirement organizations in the state of Georgia, which has become GA-HERO. Each often mentioned that attending an AROHE meeting was so memorable, informative, and worthwhile it was an experience not to be missed

by any retiree. Subsequently, Anne said, she heard Dorothy Zinsmeister and Missy Cody say the same thing. As a result, she looked forward to attending one of its meetings herself and was delighted that she could do so close to home in Atlanta this past October.

Having gone to this meeting, Anne said she could now say from first-hand experience that it was truly a first-rate opportunity to gather a myriad of ideas for rethinking how one might want to live out one's own retirement and developing and sustaining a campus-based retiree organization. It was also a chance to meet other talented and impressive persons who have dedicated themselves to supporting retirees in countless ways. She added that she believes she learned more in two days at this meeting than she could possibly find ways to implement over the course of the next decade.

Anne announced that for today's meeting, Missy Cody, Dave Ewert, Dan Hagan, herself and Dorothy Zinsmeister (and perhaps others in the group once things got going) had agreed to share some of the lessons they learned at the AROHE meeting. Each person would have ten minutes to speak, followed by five minutes for a question/answer period. **John Bugge** originally committed to being a part of this panel as well. In fact, within a day of Anne making contact with persons who attended the meeting to see if they wanted to share their experience today, John was the first person who responded to the invitation. He wrote, as she quoted: "I would like to offer my takeaways from the AROHE Conference on the topic of **Communication (and how essential a part of any retirement organization it is and must be)**. I would not need any IT or AV support, but I may come with a printed handout of bullet points."

Unfortunately, Anne said, that is all she knows about what John planned to share at today's meeting. By the time she wrote him back, seeking clarification, he was hospitalized and unconscious. She expressed the hope that there were others present at today's meeting who might have had conversations with him about the issue and could perhaps shed light on what he would have wanted to get across to us. There being no one in the room who was able to do this, however, the program proceeded.

**Missy Cody** said she was especially interested in the programming around the **transition of faculty and staff to retiree status**. She found it interesting to see that we have shared concerns with many other groups. The most important university goal is **retaining talent** as this transition occurs. Another issue was **building connections**. In the throes of everyday worklife, we build connections with our colleagues. But retirees don't necessarily remain active on the campus and in their professions upon retirement. Yet they can develop relationships with alumni (who want to come back to see them rather than the more recently-hired faculty), build connections with the community that make it better for all of us, build connections to support early literacy, etc. And they do all this while saving the university money, because those who had been working for a long time had built up higher salaries than younger, incoming faculty/staff. So, IF institutions can keep you active and IF you have the connections to them and the communities, retirees can give their money and time to universities and expand what these institutions can do. As part of that, the hope is that retired faculty and staff will become mentors to those just arriving on campus. One deficiency, Missy noted, is that staff are seldom asked to be mentors although in most cases they know how to make someone's first year livable. For example, they know where

to find parking, food after 5 pm, how to get things done, etc. As you transition staff, she advised, keep in mind that their knowledge is really important to newer, incoming individuals.

Beyond the above, the first **goal of any transition program** should be to address the matter of **financial security**. Some states require those planning to retire to go through a 5-year period of transition. They essentially have a 1/2 load at full pay for five years. But as they come to the end of active employment, they continue with some alternative workload, focusing on what the university wants, such as mentoring. Another goal such a program should address is **fulfillment**. You hear issues related to it when a retiree meets someone new and is asked "What are you doing?" and replies: "I used to be . . . ." You want people to be able to talk about what they are doing now, not what they once did. One part of transitioning to retirement is that part where you see who you are becoming. It's about your still becoming who you want to be now as you once did when you were younger and launching an initial career. People won't be happy in retirement if they are financially secure but just sit at home looking at their walls all day long.

Some transition programs involve reducing the loads of persons about to retire so they can finish things they have begun. They might finish research projects, or prepare publications related to them. Some programs ensure that, before they retire, individuals have particular job duties taken care of or that those teaching after them have what they need. Such transition programs help you "finish up" so you don't feel you left things unfinished. This involves a process of weaning you from your job from day to day.

Missy explained that she didn't have any problem making this transition when it came her turn to retire. She is still working on projects and said a lesson she learned from AROHE was that we should all be helping people find it possible to not become a used-to-be.

Martha Wicker: I'm glad you spoke about this topic. The phased retirement plan is something the USGRC could work on. GA-HERO could also work on Transition to Retirement workshops for those just approaching retirement.

Missy Cody: GA-HERO provides some kind of assistance along these lines state-wide. Those who are a part of it can continue to share all they are doing.

Dennis Marks: The USGRC, in collaboration with the University System of Georgia, has just come out with a brochure on planning for retirement. Dorothy and Missy were a part of its development. It is now up on the USG website.

Dorothy Zinsmeister: When it was first proposed, the USGRC submitted documentation to the Chancellor about what we were going to do as part of our responsibilities once we were established. One of these was what you and Missy are talking about - helping institutions think about transitions for faculty moving into retirement. Most articles in the *Chronicle of Higher Education* have to do with only some of the folks who serve as faculty in higher education. They focus on new assistant professors, who are developing in their work, teaching, and preparing for tenure and promotion. They also focus on a middle group, who are expanding their talents and looking to become full professors. Once people become Full Professors, there is hardly anything done for them. It's assumed they can do just fine on their own. Some retire early. Some stay on

at their institutions. Thinking about retirement along these lines, we proposed that the USGRC would help.

Missy Cody: You can go on line and look at the Planning to Retire brochure. There is talk now of organizing Webinars for persons approaching retirement. If you find an error in this brochure, let us know. If a phone number doesn't work when you call it for more information, do let us know.

Martha Wicker: Was that brochure sent out from the USG? And, if so, to whom?

Missy Cody: It was sent out at Georgia State to retirees and those who were 50 years old and older. It is also used at every pre-retirement meeting.

Martha Wicker: Our benefits folks had sent it out at Clayton State University, but not to all. They wanted us to email prospective retirees about this, but we only have email addresses for current retirees so we couldn't reach others.

Howard Woodard: We had a booth at the recent Benefits Fair. We developed a brochure about what to do to prepare for retirement, beginning five years out from a planned retirement date. Next Monday, an Economics Professor will tell folks how to use 457 and 403 accounts to enhance their retirement. We have to let the younger employees know there's something out there to help them.

**Dave Ewert:** I found extra helpful Session 1: **Transforming the All-Important Transition to Retirement.** Participants in this session included Emory University; Univ. of North Carolina, Chapel Hill; and the University of California Berkeley. All have had programs for retirees aimed at the school's needs, the retirees' needs for fulfillment and the psycho-sociological implications of retirement. They have two decades of experience, all using different methods, and all successful. All involve partners and evaluations. Schools need to handle retiree concerns beyond the financial and health benefits issues. They need to target fulfillment issues. Every one of the institutions in this session had good partners and the key to their success was these partners. Presentations from all sessions except Berkeley's can be found on the AROHE Conference Resources page (see p. 14 of these notes for url).

Emory set up one-on-one mentee/mentor relationships for three one-hour sessions. Its program was organized in collaboration with the university's Faculty Staff Assistance Program (FSAP). The FSAP devised a training program to prepare Emory University Emeritus College (EUEC) faculty to mentor active faculty approaching or considering retirement. A Train-the-Trainers experience was run by FSAP. 18 were trained as mentors and the group has worked with 40 mentees to date. Historically, the Emeritus College has been involved in work like this in the past. The Emeritus College has partnered with HR for training. The key is the match-up between mentor and mentee, which is handled by the EUEC. Questions asked to determine this include: "What is your academic department?" "What are your interests and activities?" "What do you do in your spare time?" Those providing the answers were told: "If it takes you more than 5 minutes to come up with your answers, you're probably over-thinking the questions." Once responses are provided, a Matching Committee identifies 2-3 potential mentor/mentee



relationships. The mentee selects the mentor from these possibilities. Although the program is designed around 3 one-hour sessions, Dave inferred that the relationships developed lasted more than this. Evaluations from mentees and mentors are high. And evaluations from the Emeritus College and the HR Department are as well. Dave went on to say that, given that these are all big institutions with a lot of resources, what he would like all of us to consider is identifying what piece of what they do might be something we can adopt or adapt. Setting up one: one relationships seems to be a program within our reach.

Chapel Hill's program was more traditional. It organized a class experience that lasted for eight 2.5 hours sessions. About 8 faculty attended. There was a reading list and a syllabus for the session. The President and Chancellor participated in different classes as students. They were in a position to provide "firepower" for some of the needs expressed after the program occurred. The Retired Faculty Association is a partner and it works with the Institute for Arts and Humanities in conducting sessions that are designed "to empower faculty to achieve their full potential" in retirement. There are 8 faculty and two facilitators (previous participants) in each session. They begin in the Fall with a syllabus and reading list and have done so from 2016-2018 thus far. On the reading list is *Faculty Retirement. Best Practices for Navigating the Transition* edited by Claire A. Van Ummersen, Jean M. McLaughlin, and Lauren J. Duranleau (2014). Brief papers are assigned at every session. The final session is on "What do you hope to achieve in retirement?" All of these programs are trying to get persons retiring to verbalize some type of commitment for the future. The evaluations of this program (sent to the Provost and HR) indicate that the "information provided is neither complete nor uniform" for retirees. And they have to get a bigger audience than 8 faculty per year to sustain the program.

Dave said he had hoped to get all the slides from the persons doing the presentation at Berkeley, but only a few were sent in. Their partner is a for-profit consulting firm - Resilient Aging Lab LLC of Berkeley. They started with 49 prospective retirees in an all day workshop. The evaluations they received indicated that faculty are not ready for a session this long. This was followed by six one-hour sessions in an "on-line gathering" format. They use the internet and set up networks on line in a pilot program. Six to eight people in a group were trained to use networks and a zoom conferencing tool. Once you start with a network, you can add friends. At the outset, participants used instruments and questionnaires that focused on the concept of "map your own path." The director of the Retiree Center and the private firm, Resilient Aging Lab LLC of Berkeley, worked together. The last stage is a self-managed network of those who share common goals and interests. So far as metrics involved, there were 2-3 instruments. One was given before the transition to retirement program. The other was given afterwards. The program tracked a lot of metrics and there was a three-month follow-up. In Berkeley, the group measured everything. There was a dramatic difference in the feelings people expressed about themselves in retirement. It went up a big notch. They also tracked how long people stayed on the network. The evaluations suggested the group might do better by changing the one-day workshop to two half-day workshops or six 1-2 hour sessions that include a more homogenous group in terms of time to retirement. It was also suggested they offer tools, not solutions. Of 49 persons attending, 2/3 were women, 15% minority male, the rest were undeclared. In our university, Dave added, it's not likely that 2/3 of retirees would be women. They just aren't there on the faculty.

**Dan Hagan.** My AROHE experience started off with a bang. The first **keynote** was "really fantastic" in my opinion. It was **by Steven Tipton**, Charles Howard Candler Professor Emeritus of the Sociology of Religion in the Candler School of Theology at Emory University.

Hagan spoke about a series of facts mentioned in Tipton's talk, entitled "The Life to Come: Dreams and Doubts of Retirement." These included the fact that 1/3 of our nation's workforce is now retired and additional persons are retiring at the rate of 10,000 per day who will each likely live about 18 years as retirees. More important, Tipton focused on what will you and I make of this time? Retirement offers the promise of self-renewal. You can get into shape, get healthy, stay young, and give something back. You may also have an encore career. Dan said he was blessed with this. He taught a combination of 32 years at two different institutions before retiring for the first time. He "flunked retirement" at that point and returned to teaching at a third institution for another 10 years until he retired in 2015.

We can recreate our lives, rekindle our love of life, and seek the spirit moving within us, Tipton emphasized. What can we do with this time we have? Should we think about closing the differences between the haves and the have nots? In this crowd, we have no have nots. You have the TRS, a 401, etc. We're doing pretty well here. But what about those who need some help? What must we do "to be saved"? There are issues in our country, and right here in River City, with rising costs for food, lodging, healthcare, transportation. There are opportunities where we should think about fair taxes and give to significant and worthy causes, help meet the needs of the needy. "Is there anything worse than death?" Tipton asked. Some say it's outliving the money they have in their retirement.

Tipton noted that if you look up retirement on Google, you see images of white sand beaches, lovely sunsets, people playing golf. This is retirement as an endless vacation. But is there more to retirement than this? If we can answer this, retirement can help us make the world a better place with our own two hands. Each of us is interdependent. We all need a hand occasionally. "From shaking hands to saying goodbye," Tipton said, "the hands of others lift us from the womb and lower us into the grave." Retirees can provide hands for our communities for those who are needed in our schools and our communities.

Retirement can widen our ways of seeking the common good - to make more sound legislation for clean air, water. We need some scholarly, wise folks who are communicating to the media about this. We need safe schools, jobs with living wages. Through retirement organizations we can continue our life-long calling to learn, to serve, and make good laws.

Tipton gave us a how-to talk, Hagan said. The punch line was we may need to change our way of life. And what better group than this one that brings a ton of gifts that others in the community do not have?

During this presentation, John Bugge asked the question: "Do you see a particular role for academic retirees for saving this world?" "And I think John Bugge lives on in our organization in Tipton's response," Hagan commented. "Yes, John, he replied, we have an opportunity to make a difference. But as our country's founders (Washington and Adams) noted, our constitution only works if people are faithful to it in some deep moral way. So when someone says, "You can talk or cry, but we've got the votes," we need to go much deeper about what's fair and what's true."

Looking at voting data, the top 1% when asked "What are your desires?" say: We want no taxes. We want de-regulation. We don't want corporations constrained. Tipton noted that 80% of stock sales are buy-backs designed to pump up dividends. Only 8-10% of stock sales go for

employee wages. Since 1980, how is it possible that people are not making more than minimum wage? What is our life in terms of our covenant? What mission do we have other than dealing with our health benefits? Tipton said the challenge for us and our retiree organizations is to reexamine our moral duty in retirement. In conclusion, Tipton encouraged us to get out there to uplift the lives of those who come after us. Dan also mentioned that another session at AROHE dealt with the Wisdom Institute, a group that strives to provide opportunities for retirees to volunteer and remain in service to others.

As we got ready to break for lunch, . . .

Dorothy Zinsmeister: I want to share a piece of advice I did not learn at AROHE. It has to do with name tags. When you wear one, put it on your right hand side, so when you meet someone new and shake their hand, you see their name tag and their face at the same time. And if you have the kind of name tag that is put in a plastic sleeve and hung from your neck, do not wear it down at your belly-button. Get it up where others can read it.

LUNCH BREAK - Lunch was graciously provided by the Georgia College and State University's Food Service.

### **Continuation of Lessons Learned from AROHE . . .**

**Anne Richards.** I was going to share my top-ten take-aways from the AROHE meeting, but one of them had to do with Tipton's talk, and Dan covered most of what I myself thought about sharing about that presentation and its implications for us as retirees.

1. On the topic of **communication**, which John found so significant, it was troubling to learn at the AROHE meeting that our retiree organization is not the only one that has difficulty communicating routinely and widely with all those we think of as a part of it. We do pretty well with those who continue to use email, but that is a small percentage of the retirees in our association and in most others as well. Some of our retirees do not read or write, let alone use a computer. Some prefer communicating by regular snail mail or telephone. I've also discovered that many of my fellow retirees at UWG tend to abandon their computers when they become disabled or hospitalized or don't have the financial means to get their equipment fixed, replaced or upgraded when it's necessary to do this. The notes I take at key meetings are distributed over email and are much appreciated by those who receive them. But I frequently run into people who have no idea about some of the critical information contained in them. And I'm not talking about such things as social events. I mean such things as the fact that the USG in Georgia covers prescription drug costs for retirees when their costs exceed \$4500 per year, or that the USG is NOT requiring those who are 65 and older and on Medicare to re-certify whether or not they use tobacco products. In addition, those who are not current email users are, more often than not, excluded from online surveys designed to determine what retirees might want or need from their retirement organizations. This lack of inclusivity is a serious problem in my judgment, and a major challenge for all of us who believe retiree organizations are of value to all retirees.

2. I also attended the session on the "Wisdom Institute" at the University of Maryland, Baltimore County. The institution prides itself on being a **close-knit community akin to a**

**family** and intends to continue to interact as such even after retirement. Seeing all employees as family, no dues are collected for membership in the Institute. The focus is on expressing appreciation to all faculty and staff for their service. They are about friend-raising, not fund-raising. There are no forms to fill out to become a member of this organization but persons have to willingly agree to become a member by calling in or opting in online through their HR office. All who opt in are automatically enrolled as a member and receive a "Certificate of Retirement" to indicate their enrollment. They have a 50:50 ratio of faculty and staff and experience a challenge in communicating with all of them. They also have a "huge disparity" between the number of faculty and the number of staff involved in their activities. They do a lot of volunteer community service projects. I also attended a session on a retiree organization at USC in California. Their motto is "Colleagues for Life." They too have an opt in process if retirees want to get "Gold card privileges," such as parking, library access, discount on dental services, free counseling services, USG email. They charge a membership fee of \$20-25 per year but this enables them to attend a luncheon event ("free of charge") four times a year. They bring attention to retirees in local newspapers.

3. It was mentioned by the leadership of AROHE **that the trend (since 2008) in retiree organizations is to have the membership in them include both faculty and staff.** Yet many retiree organizations were established for emeriti faculty only, or for faculty only. I was struck by the fact that most of the presentations at AROHE featured how faculty are honored by and involve themselves in activities in their retirement organizations. As a retired faculty member, I found these presentations informative, inspiring, and meaningful, but realized also that they might not appeal as much to persons who retired from our Facilities/Maintenance, Grounds, or Custodial Services, for example. Although both UMBC and USC talked about including both faculty and staff, they also discussed the difficulties in communicating with and involving staff. Following the AROHE meeting, I had a candid talk with a retired staff member on our campus. He acknowledged that he feels out of place at times in retiree association activities and said, if it were up to him, he would change the way our annual reception to honor retirees is conducted so as to make it more "fun" and less formal (as he sees it). He misses the camaraderie with his co-workers which he had when he was employed, and isn't finding as many common interests with fellow-retirees who happen to have more education. I appreciated his honesty and realized this is a matter our retiree association is going to have to address in the very near future. So if any of you have any ideas as to how to bridge the gaps between faculty and staff in your retiree organizations, do let me know.

4. Persons in the leadership of AROHE spoke of how **retirees are "the largest untapped resource" an institution has** and encouraged involving them once again in teaching, administration, professional development activities, and service projects. But many of our UWG retirees (I would even say most of them) have found meaningful and time-consuming projects they find appealing in their retirement and they are not interested in returning to activities they were relieved to leave behind when they retired. Only a handful of us seem to continue to enjoy being involved in attending committee meetings, organizing events, and volunteering for jobs that need doing at the university (i.e., related to graduation, fund-raising, mentoring, etc.). As the second keynote speaker at AROHE, Roger Baldwin, pointed out, "most retirees want to be productively engaged in the latter part of life," but I've discovered that retirees have their own

ideas about what most appeals to them - including gardening, home remodeling, traveling, spending more time with grandchildren, getting a part-time job, etc.

5. Roger Baldwin also mentioned something else about **retirement** that I found meaningful. It was that, for too long, retirement has been considered as one side of an on-off switch. The switch is on when you're working and off when you retire. Instead, it should be seen more like a **dimmer switch** - where persons can dial up their engagement if they wish, or dial it down as well.

6. Another piece of helpful advice I received at AROHE was a statement made at the closing plenary session with AROHE's leadership: Instead of persons in retiree organizations going out with their hats in their hands seeking funding or privileges for themselves, AROHE encourages them to turn their message around. **Focus instead on how your retiree organization can provide value to the other party instead of on how another party can help retirees.**

7. One really good idea I came away with from this meeting emerged in a discussion during the Resource Exchange Fair with a faculty member sitting at another table. She was sharing information about a survey that had been conducted regarding retiree interests or concerns and I just happened to ask how it had been constructed. It turned out the retiree association has developed a **connection with a department on campus that offers a class that requires each student enrolled in it to design a survey**, carry it out, and report findings and conclusions (all within one semester). When the retiree organization wants to survey its membership about a particular issue or issues, the group makes this known to the person teaching the class and a student volunteers to use the group's issue(s) as the basis of a survey that can be conducted for the student's class assignment. The nice thing about this is that the survey is carried out by students trying to gain experience who have the supervision of faculty with expertise in conducting survey research. It's a win-win situation for all concerned.

8. Another piece of advice I picked up at the meeting had to do with **getting things in writing** that relate to the existence, achievements, and future of one's retirement organization. It was recommended, for example, that retiree organizations make an effort to **become a part of the strategic plan of their home institutions**, and put together an **annual report** that shows the various ways in which their mission and activities dovetail with this strategic plan. Given that I learned about stellar retiree organizations that, once upon a time, secured funding, honors and awards, and space on campus but then lost funding and space when a new administrator came along, this seems a very prudent thing to do for all of us who care about sustaining our higher education retiree organizations as the future unfolds.

9. I was impressed with **the range of activities that retirees engage in across the country and the multiplicity of productive partnerships that have been developed between retirees and other sectors of the university or the surrounding community.** Here in Georgia, I learned at a prior GA-HERO meeting that retirees partner with students at Emory who are preparing for careers in the medical profession. The arrangement is designed to help students better understand the struggles and strengths of senior citizens who will one day become their patients. It also gives retirees an opportunity to mentor younger generations. I learned at AROHE about the existence of numerous other types of partnerships involving retirees. For example, retirees

have become volunteers at theatres and museums; helped individuals figure out which Prescription Drug plan might be best suited to their needs; assisted with neighborhood initiatives in the inner city; provided temporary staffing for conferences and similar events; mentored students in a variety of disciplines; read/scored student applications; assisted with election monitoring; provided services for international students (such as language practice or hosting for holidays); acted as docents or guides for tours, gardens, and athletic events; helped staff campus events such as new student orientations, open houses, and commencements, etc., etc. etc. And this doesn't include those who are continuing to teach, conduct research, and serve on committees at their former place of employment or elsewhere.

Anne added that those interested in accessing **Materials from the (2018) Ninth Biennial Conference of AROHE** can go to

<https://www.arohe.org/2018-Conference-Resources> (for power point presentations for most session at the Conference)

arichard@westga.edu for an assortment of materials distributed at the AROHE conference (bundled into a 121-page PDF). This compilation also includes the handout Gretchen circulated at today's meeting (an announcement from AROHE seeking persons with particular talents and skills to bolster AROHE's capacity to better serve retirees).

arichard@westga.edu for notes she took at some conference sessions (including the keynote addresses).

**Dorothy Zinsmeister.** Dorothy stated that her lessons learned, like Anne's were a pot pourri of topics.

One was a comment by Caroline Kane, current President of AROHE, who said that she wished AROHE had come up with **the name HERO** when determining what to call itself, especially since it would have required just a little juxtaposition of the letters in the present name.

As Anne mentioned, we learned that the trend is to have the membership in retiree organizations include both faculty and staff. Because it's difficult to convert an organization that began in a separate way, it's **best for those just developing their retiree organizations to start with a combination of faculty and staff.**

No matter what kind of institution you are a part of - whether it is heavily endowed like Emory or gets a state budget, **all goals for retirement organizations are pretty similar.** This makes talking with other retiree organizations about a multitude of things easier, because we can each benefit from what others have been doing. **AROHE** is good at talking about issues with retiree organizations and how to solve these issues. The presentations were such that faculty and staff presented new ideas and programs including ideas for community involvement. They make it easy to understand and explain how you can modify their ideas for your institution's culture and interests.

"Having **face-to-face communication** is very important to me," Dorothy stated. When I worked at Kennesaw or the System Office, I never picked up my phone when I wanted to talk with someone about something important. I walked over and talked with that person face-to-face. They knew who I was that way. And when I go to the System office now, they know who I am. This is a very useful thing to do. I'd encourage you to do that even if you know the person you want to talk with.

One of the enlightening things I learned: Many more **active faculty are collecting data and doing more research on what retirees are doing.** This helps retiree organizations move in the

right direction. The Roger Baldwin keynote talk set the stage for this. It's helpful to know this is happening now and we're not just getting anecdotal information about what retirees are doing. When it comes to doing research on the activities of our retirement organization, I can say how many attended a given event and how many events we organized. I don't know if people think they would like to come back to some of these events. I have been trying to think about what else we can do to present a case to a Vice President or President about the value our organization has to the institution. Data helps with that.

**Another trend** - individuals interested in **putting together state or regional retiree organizations**. There are some in California, though they are not as organized as GA-HERO.

Another thing - **there is a huge difference in the resources and benefactors at institutions**. You can go to AROHE and hear about Emory, which is a standard to which we all aspire. At Winona, someone built a house where retirees can meet. At Emory, a donor was found for various events. Then there are other groups who struggle to get institutional assistance for planning activities and events. You can learn that there are ways to accomplish what you want with or without resources, however.

Bringing about change can be a slow, slow process. **The USG Retiree Council** has been in place 4 years. We have a list of responsibilities and we are crawling through those at the moment. The list still remains there as we do other things. **Getting an organization up and running and sustainable and keeping it so is hard to do**. It requires a lot of individuals. If they are not there, people tire quickly. So **recruiting individuals for your organization is an important thing to do**. My dean always used to say to us: "Remember, work smarter, not harder." This usually meant **using technology more effectively**. This is good advice.

Martha Wicker: We should do a survey and get research to show our value in order to secure more resources.

Dennis Marks: AROHE gave Emory an opportunity to showcase how it is a national model for Emeritus Colleges in the country. GA-HERO also emerged as a national model of retiree organizations getting together and helping each other. The steps to retirement brochure that Howard talked about earlier today is a direct result of GA-HERO. Emory brought a copy of its brochure to an early GA-HERO meeting. I took it and our HR Department put together something similar. And Clayton State University, the University of West Georgia, and now Georgia College and State University have put one together for their campuses. More recently, the System level has developed the "Planning for Retirement" brochure. It does not replace the need for having these 5-year-out brochures on our campuses, however. A third national model is the USGRC. It has become a model for how retirees can get involved with state system offices. We really need to interact directly with them.

Marilynne McKay: Anne asked how you can get more staff involved in retiree organizations. We at Emory have interdisciplinary seminars that are meaningful for faculty, but we know that staff prefer something less academic, like going together to games, seeing movies together, doing something fun together. Some organizations had a strong staff group on an equal footing with the Emeritus College and still found mutually beneficial ways to assist one another. Some people are getting forced out of their jobs, and they too need a place they can go.

**6. HIGHLIGHTS of the USG RETIREE COUNCIL (last meeting held 10-25-18 at Georgia Tech.)**

Ron Bohlander, current President of the USGRC, began by stating that the USGRC is an important resource we have in the state of Georgia. He also said that it's remarkable that having both the Retiree Council and GA-HERO, we each draw a good participation from across the state of Georgia. We're a big enough state yet people make a real effort to drive to the meetings of these groups. At the last meeting of the USGRC, 23 institutions were represented, 24 persons were present in person, and another 6 showed up on the phone. So there was good representation.

Dorothy Zinsmeister: I have to say that for the six people attending a four-hour meeting on the phone, this is a terrible experience.

Ron Bohlander: I agree that this is not ideal, but sometimes constraints do not allow attendance in person.

The Mission/Purpose of the USGRC is "to promote and foster the welfare of System retirees and of the University System of Georgia through the combined creativity and expertise of retiree representatives from System institutions." Since consolidation, there are now 26 institutions in the state System. When the Council was born, a lot of the driver for it was to get ready for a new health exchange world. We still do focus on this and provide feedback to the System office and to Aon about it. But this mission statement reminds us that we're embarking on a mission beyond this.

At our last meeting (held 10-25-18 at Georgia Institute of Technology), Karin Elliott, USG Interim Vice-Chancellor for Human Resources reviewed USG benefit decisions affecting employees and retirees which she presented at the Board of Regents meeting in August, 2018. This presentation included information about the following:

- \*Total Rewards Steering Committee (TRSC) that advises the USG on benefits support to employees and retirees.

- \*Changes in insurance costs to USG and to employees/retirees that indicate costs are running 2-3% higher, which is under the national average.

- \* Maintenance of the amount of the contribution from the USG to Health Reimbursement Accounts of Medicare-eligible retirees given over the four years the Aon Retiree Health Exchange has been in existence. The USG feels like it is doing a good job. The combination of their costs and retiree costs for healthcare are growing at 1/2 the national rate. There have been no changes, however, in the amount we get per retiree and spouse each year to support retiree payment of healthcare costs. We hear reasons from the USG for this that vary, but it's clear that representatives on the Council are looking forward to an increase in this benefit.

- \* Of the approximately 21,500 USG retirees, about 84% are Medicare-eligible. In addition, the USG has health plans it subsidizes for pre-65 retirees.

- \* Regional meetings are being set up to better prepare pre-65 retirees who are 1-2 years from making a transition to Aon. The first were held October 31, 2018 at the University of Georgia in Athens; November 2, 2018 at South Georgia State College in Douglas; November 5, 2018 at Georgia Institute of Technology in Atlanta; November 6, 2018 at Augusta University in Augusta; November 7, 2018 at Georgia Southwestern in Americus; and on November 8, 2018 at the



University of West Georgia in Carrollton. The USG is realizing they need to communicate more effectively on an ongoing basis with retirees and those planning to retire (regarding decisions the latter have to make in retirement). Hopefully, all in this room heard about these meetings. This is one thing the USGRC has been emphasizing.

\* Open enrollment for USG personnel (not Medicare-related): October 29 - November 9, 2018.

When Karin was discussing the matters outlined above, 95% of what was said had to do with active employees. Less was said about persons in the Medicare-eligible area. We reminded her that the vast number of those in the USGRC are in the latter group.

A briefing by personnel from Aon also took place at the USGRC meeting. The USG has designated Aon to administer a Health Exchange offering Medicare Advantage, Medigap, and Part D Prescription Benefit programs for Medicare-eligible retirees. The USG provides a Health Reimbursement Account (HRA) for retirees and spouses which can be used to pay some of these costs. The Aon rep reported on improvements in their communications to retirees, including new webinars being developed to help new retirees understand the Aon Retiree Health Exchange and how to use it. This is big news. It's nice for them to be live, but important for them to be archived for those who need this at a later point. People transition to retirement around age 65, but at other times as well. And most of us don't focus on the information available about this transition until we really need it. Kathy Tomajko on the Georgia Tech campus has been talking with new retirees. They feel a bit lost without information like this.

Also covered were the dates of the Medicare Open Enrollment period (October 15 - December 7, 2018), coming changes to Medicare (which will disallow new enrollment in type C and F Medigap plans after 2019), and changes in documentation needed for reimbursement requests. Disallowing future enrollees in the C and F Medigap plans means that costs for those remaining in those plans will be more expensive in the future and will rise faster than they will in some of the other plans.

Dan Hagan: Are we still encouraged to use the funds provided for our HRAs and not hold them back for some future time?

Ron Bohlander: Yes. The perception at the System level is that, if people are not fully utilizing what they were given, they may not need as much as they were given. They gave us a more generous amount at the outset to encourage people to feel good about the transition. People who are using it are increasingly feeling pinched by higher costs, however.

The focus on improving communication I sense is now major. What we get across to the USG is decisions faced by retirees are complex because each retiree must manage many different income and benefit providers. In addition, guidance and processes to follow are significantly different for those with covered spouses still working, pre-65 retirees, and those who are Medicare-eligible. There is a different story for different types of individuals. There are those who are retired and Medicare-eligible, but have a spouse who is still in the System healthcare plan. There are those who are both pre-65. There are those who are both 65 or older and Medicare-eligible. It is not helpful to have all of these on one webpage. This results in a jumble and confusion on the delivery of the message. More work is to be done in this area. We are pretty effective in making things a little better as we go along. We encourage the USG to bring forth webinars that

might be helpful. We are working with the USG to improve websites and brochures. Both the USG and Aon are introducing webinars. There is a recognized need for greater teamwork between and among campus retiree organizations, campus HR, and the USG on more effective communications.

Dorothy Zinsmeister: I have a technological question. How many can view a webinar at the same time?

Howard Woodard: If you're using WebEx you can have 1000-3000 connections attached to an event center. If it's just a meeting function, you can have 1000 connections. If you dial in or have people use a toll-free number, it's a number around 500.

Dorothy Zinsmeister: Given that we serve about 20,000 retirees, even the 1000-3000 is not enough. So we'll need more than one session.

Howard Woodard: We do WebEx sessions once a month at GCSU for Council meetings.

Ron Bohlander: We have used a telephone channel, but I prefer face-to-face meetings. One of the mentoring messages was that if you need something from someone go to them in person. It will do wonders beyond sending them email.

We're never quite satisfied with the amount of email addresses we have and we know some retirees don't use email. Another problem is that retirees may give us contact information initially but this is the last time we hear from them. They may subsequently change their email address, but don't always tell us about the change. I fear that about 25% of our email addresses may be non-functional ones. We still need to be able to reach the retirees of any of our institutions better than we do. Currently, we reach about 600 of 2,000 retirees at Georgia Tech.

We need a pilot project to send to all the email addresses the USG has for retirees - to notify them to let us know about any updates in their contact information. We know the USG won't give us their email addresses, but we hope the USG can team up with us and send messaging to all retirees on our behalf. Now, given OneUSG connect, pretty much everyone has an identified email address.

Dan Hagan: We must be able to connect with these folks. Does the TRS speak with OneUSG?

Ron Bohlander: I doubt it.

Dan Hagan: It's so very important for us to communicate with our retirees. I hope you can use your connections with the USG to bring this about.

Ron Bohlander: I too hope we can partner with them to achieve this.

Dorothy Zinsmeister: The USG often asks us (in our retiree organization) for retiree email information. You can get around privacy restrictions if you get permission from retirees early indicating it is ok for you to reach out to contact them. It's when they change that address or die that problems arise. When John Bugge died, he was actively involved in so many organizations

that everyone knew about his death. When some of our retirees walk away from our institutions, we have no information about them and don't even know if they are alive.

Ron Bohlander: In the Silver Jackets (retirement organization at Georgia Tech), we send out obituaries when we become aware of them and feed this information back to our HR office.

Missy Cody: Not only retirees, but survivors also need to know the information we want to distribute. And if we've lost a retiree, we've certainly lost their survivors.

Ron Bohlander: A good thing that's been happening is that members of the USGRC have been invited to serve on subcommittees of the TRSC. The three past chairs of the USGRC are currently serving on these. In this way the USGRC participates in and receives reports from TRSC subcommittees.

Our representative on the Well-being Subcommittee is Missy Cody. The USG is developing a system-wide culture and environment to support well-being. Many programs, especially webinars, are available to retirees (although retirees are not eligible for the incentives currently provided to active employees for wellness activities). Go to <https://www.usg.edu/well-being/> for information about wellness programs. A campus near you may have programs that include retirees. Check with HR to find your well-being contact.

Our representative on the Communications Subcommittee is Dennis Marks. This group is spearheading the communications improvements described earlier and Dennis is helping to maintain momentum with regard to them.

Our representative on the Retirement Advisory Subcommittee is Dorothy Zinsmeister. This subcommittee provides input on retirement programs. Thus far there are no changes in the Teachers Retirement System (TRS) but consolidation and simplifications are coming for Optional Retirement Programs (ORP) and other investment programs. A representative from the TRS will be at our next USGRC meeting.

Dorothy Zinsmeister: Retirees in general should be aware that the **August meeting of the Board of Regents** is open to the public. You can go and listen but not speak. Board meetings are always well-attended. Every August a presentation is made about compensation for health benefits for active employees and retirees. Karin announced this past August that the stipend for retiree healthcare will be the same amount of money as has been given previously. I have no idea how you would get this information if you were not there. I have no idea if anything went out from the USG about this. The agenda for each Board meeting is posted on the Friday before the meeting. You can scroll through it and look to see if there is anything on it that is of interest to you. Karin made a presentation (on healthcare and the \$2736 amount the USG was giving to retirees for 2019) to the Personnel and Benefits committee of the Board of Regents in August. Following that Board meeting, the minutes of the August meeting were approved and posted after the September meeting of the Board. I thought I'd go in and see Karin's Power Point presentation in those September minutes. But nothing from it was in the minutes. And because it's not there, there's no way of verifying what the amount was or getting that information unless you are on site for the presentation itself.

Ron Bohlander: We did eventually get a letter from Aon or someone - a good while later.

Dennis Marks: Decisions made about healthcare are made in the TRSC subcommittee in March or April.

Ron Bohlander: Here are some of my final thoughts:

We encourage retirement organizations to be assertive with their institutions about support to retirees, such as

- \*Support for travel to meetings like this. It's important to know about this and try to get the benefit of this support. This is something we need to work on beyond healthcare.

- \*Financial, space and staff support to campus retirement organizations.

- \*Access for retirees to campus resources like the library and recreation centers. We formed a library resource subcommittee thru the USGRC. We have a plan to try to achieve better library access for all retirees so they have full access to digital resources, for example.

Kathy Tomajko: This would be an "opt-in" system. We would make it available to those who prove they are retirees and want access. This will be a helpful tack to take due to contracts for licensing. The system believes user fees would go up problematically if all retirees wanted this kind of access. It's important to those who want to and would use this type of access, however. One retiree was appalled to discover that access of this kind would be denied to retirees.

Martha Wicker: At Clayton State, we've always had this kind of access. More recently, as long as retirees mention a "portal account," they can log in.

Ron Bohlander: We can use benchmarking with other universities in Georgia as leverage.

Kathy Tomajko: Access varies. Yours may not be a problem but others are not getting access and we want more consistency throughout the USG. We anticipate that if we can get this "opt in," some retirees can get things from their homes. A login credential will have to be maintained, however. It's difficult for us to have more than the "general architecture" now for what we want to do. Individual institutions have the authority to decide these matters.

Dan Hagan: Another perk we have is access to software. I can go in through the portal and get free software. This would normally cost about \$300-500. I also have access to low-cost, discounted software that the USG has (e.g., Photo Shop, Adobe Acrobat editor). This costs \$15 for Emeritus faculty. Using things like the survey Dennis put together can be leverage in appealing for upgrades we need that others have.

Ron Bohlander: The Council and GA-HERO have been fostering the idea that retiree organization creation is a good thing. If you hear about fledgling efforts, let us know. We seek representatives from and the development of retirement organizations at all USG institutions. It's wonderful that we have public and private institutions here in the state of Georgia, so we have recruitment prospects out there and more would be welcome to the party.

We cherish and support organizations like the USG Retiree Council and GA-HERO. We have something special here in these two organizations and it's wonderful we can sustain them. We are lucky to have them for mutual support and collective action. Support for the national

organization AROHE is also encouraged. The recent AROHE conference at Emory University was a great boost to creative thinking on behalf of retirees and retirement.

Attendee: If we can contribute our action plans to strategic institutional plans that would be grand. Retirees could help their institutions accomplish these plans. We can use our mission statement in support of this.

Dan Hagan: I went to a Board of Regents meeting where former Chancellor Huckaby announced his retirement. He ended the meeting with the following quote: "With age comes wisdom, but sometimes age comes alone. In this room age has not come alone. I'm proud to be part of this group.

Dave Ewert called attention to the handout Gretchen left with us - about AROHE's new Project Grow, a change-makers volunteer corps. Training sessions for this will be held in January. Some of you might be interested in giving back by taking on the types of jobs described in this handout. AROHE is in the process of recruiting people for these jobs.

Carol Pope: I'm not a graphic designer. But surely there are classes in graphic design at your school. Please give some serious consideration to finding someone who might be able to provide graphic design assistance for our GA-HERO website. I will follow-up with all leads given to me so we can better represent who we are to other people.

Dave Ewert: Our next meeting will be somewhere in Metro Atlanta. It has not yet been determined. But the bar is now very high to be a host institution. Please join me in thanking GCSU for all they did to provide support for this meeting (including lunch, and a bag of take-aways) [Enthusiastic applause ensued.]

Judy Malachowski: It was our pleasure. Paul Jahr and I and others on our campus had fun doing this.

ADJOURNMENT: The meeting adjourned about 1:50 pm.

Respectfully submitted,

Anne C. Richards  
Secretary