

**GEORGIA ASSOCIATION OF
HIGHER EDUCATION RETIREE ORGANIZATIONS, INC.
(GA-HERO)**

Annual Business Meeting [held via ZOOM]

Tuesday, June 29, 2021

1:30 p.m.

MINUTES

Present: Wayne Book (Director, Georgia Institute of Technology); David Boyd (Director, Valdosta State University); Gray Crouse (Treasurer, GA-HERO, and Zoom host); Harry Dangel (Director, Georgia State University); Debbie Durden (Director, Clayton State University); David Ewert (President, GA-HERO) Kathryn Grams (Director, University of West Georgia); Anne Richards (Secretary, GA-HERO); Ron Swofford (Director, Perimeter College of Georgia State University); Howard Woodard (Director, Georgia College & State University); Holly York (Director, Emory University); Dorothy Zinsmeister (Director, Kennesaw State University).

1. President Dave Ewert **called the meeting to order** at 1:30 p.m.
2. **Presentation of Slate of GA-HERO Officers for July 1, 2021 - June 30, 2022.**

Dorothy Zinsmeister presented the following slate of officers (to serve from July 1, 2021 to June 30, 2022) for approval by the Board of Directors:

President: David Ewert
Vice President: Ted Wadley
Treasurer: Gray Crouse
Secretary: Anne Richards

Howard Woodard seconded the motion.

There being no additional names submitted for consideration, a voice vote was taken among Directors participating in the meeting. All participating on the call voted in favor of the slate. There were no votes opposed to the motion. It was thus approved by acclamation.

2. **Discussion regarding potential project to be undertaken by GA-HERO - a Mentoring Project addressing issues of concern to pre-retirees.**

A lengthy discussion took place regarding the feasibility and logistics required to put in place a pre-retiree mentoring program on the campuses of both public and private institutions in the state of Georgia, modeled on the program currently in existence at the Emeritus College of Emory University. It was agreed that the Board would support providing a discussion of creating such a program at the upcoming Fall membership meeting of GA-HERO.

Adjournment: 2:35 p.m.

Respectfully submitted, Anne C. Richards, Secretary

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NOTES

Discussion regarding potential project to be undertaken by GA-HERO - a Mentoring Project addressing issues of concern to pre-retirees.

President Dave Ewert explained that one of the successes of the work of GA-HERO has been helping in the establishment of the University System of Georgia Retiree Council (USGRC) for public institutions in the state of Georgia. He acknowledged the significant contributions of Dorothy Zinsmeister in bringing this about. Also as a consequence of the formation of GA-HERO, a pamphlet outlining a process of moving from pre-retirement to retirement was shared by the Emeritus College of Emory University and subsequently adapted by other institutions in the University System of Georgia thanks, in part, to the encouragement of Dennis Marks, when he was chair of the USGRC. Dave also suggested that it might be time for GA-HERO to take on yet another initiative, along the lines of a mentoring program for pre-retirees.

The program currently in place at the Emeritus College of Emory University was the subject of a presentation at the biennial meeting of the Association of Retirement Organizations in Higher Education (AROHE) which was held at Emory University in 2018. Helen O'Shea made this presentation. Dave said that he believed GA-HERO could promote the adoption and adaptation of this model because it has been successful and does not require much in the way of funding to make it a reality.

Gray Crouse reported that the program at Emory had started at the suggestion of Pat Douglass, then Head of HR at Emory. The way the program is structured, retirees volunteer to be mentors for those who have not yet retired. Mentors go through a three-hour training program which involves role-playing and suggestions for possible issues for discussion. They then mentor pre-retirees who have volunteered to participate in the program. Because all members of the Emeritus College have been faculty, the program is aimed at fellow faculty members. HR also has a program for staff, but the issues addressed by HR are somewhat different. One issue that is more prevalent among faculty is a reluctance to retire related to a fear of loss of identity. Faculty can experience concerns that everything they have worked for during the time of their employment will disappear or be diminished once they are no longer actively employed. The mentoring program at Emory doesn't deal with more mechanical aspects of retirement, e.g., financial matters, healthcare. But it does help faculty think about who they want to be in retirement. The program consists of three one-hour sessions. It is not intended to involve mentors beyond that time frame, although some develop friendships that go beyond that. And mentees who sign up for the program are aware that they are not committing to a lengthy or unending process. There is a designated list of topics that are to be talked about at each of the three sessions. The training program for mentors has involved two professionals from HR who have more experience in helping faculty/staff with psychological issues during their employment than financial matters. The program does not require a lot of resources. Helen O'Shea coordinates the program.

Holly York: Is it necessary to have HR personnel as part of the training?

Gray Crouse: They had some printed information that was helpful in guiding discussion sessions.

Holly York: I have served as a mentor at Emory University. I thought people would be nervous about losing their place in the world. But people I have talked to are looking forward to doing all sorts of things in their retirement. I discovered that I could help them by sharing things like: Did you know you get free parking on campus?

Gray Crouse: Not a lot of resources are needed. And this program could be transferable to other areas. Mentors enjoy participating and pre-retirement mentees appreciate being able to talk with someone else about retirement. This program is one of the member outreach programs we have in place to let faculty know about their retirement and to help them understand that retirement is not where you go to sit down and die.

Dorothy Zinsmeister: How many retirees do you get? And do you do this once a year?

Gray Crouse: We have a series of retiree seminars that address issues like financial and healthcare matters. At those programs, we give pre-retirees the option of signing up for mentoring.

Holly York: I think we've had 50-60 faculty participate in this program overall. Currently, we have more requests for mentors than we have had in the past. I myself have worked with 4 persons approaching retirement over the last 2-3 years.

Dorothy Zinsmeister: We have a ceremony once a year at Kennesaw where we recognize retirees. Usually, the number of retirees goes up every year. This year, the number of retirees is close to 70-80 people. In your experience, do all who are about to retire want mentors? What percentage might want them?

Gray Crouse: Not more than 10% would be my estimate. But we encourage faculty to experience this mentoring before their retirement date. So it could occur up to three years prior to someone retiring.

Dorothy Zinsmeister: I worry about not having enough mentors for the number of people retiring.

Gray Crouse: The program does not require a huge commitment of time. It involves 3 one-hour sessions spread over weeks if not months.

Dave Ewert: The role of the person who does the matching of mentor and mentee is key.

Gray Crouse: Helen O'Shea does this and, you are right, that is important. She found it easier to do this herself. She sends a list of questions to those who want mentors. Based on their answers, and knowing her volunteer mentors, she sends a pre-retired faculty member the names of 2-3 people who might serve as a mentor - and the pre-retiree chooses who to meet with. This is not school-based, but rather interest-based. Well over half of our faculty retire from the School of Medicine. So that's a very uneven distribution of faculty and is not discipline-based.

Dave Ewert: There has to be someone in charge, like Helen to handle the set up and follow-through needed. Some partnering is needed with HR to get notices out about this kind of program.

Gray Crouse: I think one of the most important things we do in this program is request the names and email addresses of faculty who are 50 years and older each year. We are careful about our use of that list. All of our faculty are active on email. Getting this information may leave some out on campuses where staff are involved in retiree organizations, but that is not the case on our campus so far as the Emeritus College is concerned.

Kathryn Grams: Does your organization conduct pre-retirement seminars?

Gray Crouse: HR provides workshops for faculty and staff where such matters as Social Security, Healthcare, etc. are covered. We have a separate set of workshops aimed at faculty. For example, we offered

- * a seminar on "Can you afford to retire?" with an MD who has an MBA as a presenter.

This focused on helping pre-retirees assess how they can handle asset allocation. The presenter was not selling anything - wasn't a representative of Vanguard, etc.

- * a program by a psychologist talking about psychological aspects of retirement.

- * a program focusing on the Emeritus College and what it offers related to the choosing of healthcare plans. We offer an unbiased view to help faculty navigate a complicated situation as they move into a private marketplace for healthcare.

Kathryn Grams: So HR does their thing and you do yours? How would this look if GA-HERO adopted this model?

Dave Ewert: First of all we'd have to see if GA-HERO wants to do it. I retired a couple of decades ago. But you have to get someone willing to get this started. Each institution has a different environment and a different relationship with their HR office. I see this as giving institutional personnel the tools to train the trainers, the mentors. Someone takes ownership of the project. Then they see what problems, challenges they face in providing a program like this to pre-retirees. Then we can share with one another how the program is going. If your school is interested, can you find a leader to launch the program? Who wants to be that leader? In the Fall, we'll hold our membership meeting at Emory and see if Helen O'Shea could help us by hosting a workshop to enable our schools to determine if they could take on a program like this.

Dorothy Zinsmeister: One thing I see or envision is including or bringing the USGRC into the process as well. Everyone in the Council is not in GA-HERO. But one thing the Council said it would do is just this. We have talked about it in the Council but haven't provided much structure or ideas to get it moving. A huge advantage is that we could use this as a recruiting tool to get retirees involved in our organizations and provide them with useful information.

Harry Dangel: There are so many things that can be done to improve what retirees face. Perhaps a subcommittee within the USGRC could help with campus-based programs. I'd be interested in trying to foster mentoring. This fits perfectly within the context of the Council's purview.

Dave Ewert: As an easy start to the partnering of GA-HERO and the Council could be the process of training the mentors. The Council could do that. They could also help in the relationship between the retiree organization and HR.

Harry Dangel: My institution is in an urban area. Because of traffic, as retirees get older, the last place they want to go is return to campus. We've been more successful with holding meetings in a suburban area, such as where Perimeter College is. Most retirees don't want to drive downtown for anything.

Dorothy Zinsmeister: Gray said ZOOM use has increased participation in the meetings of the Emeritus College retiree group. We have surveyed our retirees. What we have heard from some is they would like to participate but we don't provide something for them to do it.

Anne Richards: What would they want provided?

Dorothy Zinsmeister: Our organization's programs are all face-to-face. We never have anyone using technology beyond what is needed in the room. I put together a colloquium for next year and was looking for presenters. The presenters wanted to be in a face-to-face situation. But I have to recruit some who might want to make a presentation on Zoom.

Wayne Book: People about to retire I've talked with want to know such things as: How can I keep my email? How do I manage healthcare? People anxious about wanting to maintain a research agenda want to know how they can use the library. So far as attending meetings is concerned, because to get to them people have to get downtown, they will come if we can provide parking for them.

Gray Crouse: I've tried to make the Emeritus College a source of information that retirees can turn to throughout the year. Access to the library is an issue. Retirees want to know if they can access electronic data bases. At Emory, however, the only ones who can do that are those with Emeritus Status.

Dorothy Zinsmeister: Do you have a Frequently Asked Questions (FAQ) page?

Gray Crouse: No.

David Boyd: We might like to borrow your questions. We've had questions at VSU about use of the library. Also about maintaining access to OFFICE 365 (Microsoft). This costs the institution on a per capita basis for faculty and students. We are working on getting this for retirees.

Dave Ewert: At Georgia State University, retirees still have OFFICE 365.

Howard Woodard: At Georgia College & State University this was an issue. All current faculty and students had access to it with full features. A second version was for use on the cloud - but it was not something someone could download to a personal computer. The latter doesn't cost the institution as much.

Gray Crouse: All retirees at Emory continue to have access to Emory email. That is provided in a web version. Only Emeritus faculty can download software to use on their computers. Access to the email is provided to persons individually. They cannot share their user ID or password with anyone else. When a person dies, the account is automatically closed. So if some persons have personal information on their email they want family to have after their death, currently all that disappears. If all family photos, for example, are stored there, it's gone when you die. We try to let our members know about this.

Howard Woodard: You can possibly work this out with the institution. We can assist them in getting that information.

Ron Swofford: I think mentoring should be pursued. I think the OFFICE 365 issue should be pursued. I like the idea of the Fall meeting being dedicated to this. I have to exit the meeting at this point, however.

Dave Ewert: We hope to have our Fall meeting at Emory. We had 45 at our last meeting on Zoom. Our goal is to have a meeting that is face-to-face but also makes it possible for others to join on Zoom. And if we follow through on the mentoring idea, each of your schools can come to the face-to-face mentoring program.

We have had zero income meetings our last two meetings. In the past, we have made \$5 per person by charging \$15 for the meeting and providing a \$10 lunch. The \$5 takes care of our website bill of about \$125/year. Do you think we can charge \$5 for persons who participate via Zoom?

Dorothy Zinsmeister: How would we collect that money on a laptop?

Dave Ewert: Carol Pope says there is a way to run it through a credit card.

Wayne Book: There are many ways to pay online these days. Square is one of them. My son works for them. Pay Pal is another. Do we have an account for GA-HERO?

Gray Crouse: We have an account with a credit union.

Wayne Book: You would have to have an agreement between your organization and the electronic pay set-up that if anyone pays that group it would flow through to the credit union. Which bank holds the account?

Gray Crouse: Georgia's Own. Any GA-HERO expense is paid with "bill pay" through Georgia's Own.

David Boyd: What about the possibility of asking each university that's a part of GA-HERO to pay annual dues?

Dave Ewert: At Georgia State, faculty are not supportive of putting money into a given organization if that organization is going to send it out elsewhere. Faculty would want to discuss that. A user fee has worked for GA-HERO.

Meanwhile, so far as the composition of the Board of Directors of GA-HERO is concerned, I'll get in touch with Directors if their term has matured at this point.

Gray Crouse: If we do meet in person at Emory in November, you should know that all our meetings at Emory will be hybrid in the coming year. So we'll be set up for a hybrid dimension for GA-HERO as well. We now have new leadership at the Emeritus Center. Ann Rogers, a Professor Emerita of Nursing is now the Director of the Emeritus Center. She will be making a presentation at AROHE at the virtual conference in October. I hope GA-HERO will be presenting there as well.

Dave Ewert: Anne Richards has been working on this. The Jesuits have submitted a proposal about the consortium they have formed and we could be an interesting counterpart to it.

Anne Richards: I have submitted a proposal for GA-HERO joining a session on consortiums (involving the Jesuits), but haven't yet heard back about its acceptance.

Wayne Book: What is AROHE?

Gray Crouse: It is the Association of Retirement Organizations in Higher Education. It was an organization that formed before GA-HERO. GA-HERO formed as a local consortium that is part of AROHE. AROHE provides information about the activities, best practices, and purposes of organizations like ours. Normally AROHE holds a biennial conference. It was last held at Emory University in 2018. The 2020 conference was supposed to be held in Phoenix, AZ, but didn't occur because of COVID. The AROHE board also felt it was not possible to hold an in-person meeting this year. It is hoped it can continue to do so in another year. Someone at Georgia Tech should be getting AROHE newsletters. You can check with that person to make sure you're on the list to receive this. GA Tech has been a member of AROHE for some time.

Wayne Book: That person is probably Ron Bohlander.

Dave Ewert: Both John Bugge and I served on the Board of AROHE. We actually met at an AROHE meeting. Although we both were based in Atlanta, we didn't meet each other until that meeting occurred at Wesleyan.

I want to thank Gray for the back-drop he created for me online (showing GA-HERO in big print).

Dorothy Zinsmeister: This year, because AROHE is virtual, the registration fee is very low. We have 5-6 persons from Kennesaw's retiree organization interested in attending. Because the conference is virtual, there are no travel expenses. I envision us getting together and watching sessions as a group. So we will have the opportunity to talk about the presentations together and in groups. My retiree organization used to pay for 1-2 of us to go to the AROHE meetings. This cost \$1500 per person (to include travel, registration, hotel). Now that it is \$100 per person for institutions that are members of AROHE, so you can bring in more people and get them interested in the topics to be discussed. The membership of AROHE is organizational, not individual. But the early bird registration fee is \$100 per individual.

Adjournment: The meeting adjourned at 2:35 p.m.

Respectfully submitted,

Anne C. Richards
Secretary