

**GA-HERO**  
**Georgia Association of Higher Education Retiree Organizations**

**Executive Committee Meeting/Board of Directors Meeting**

**2:00 - 3:10 pm**

**Held remotely on Zoom**

**Minutes**

**April 5, 2023**

**Present:** Mitch Clifton (University of West Georgia); Missy Cody (Georgia State University Co-President), Gray Crouse (Emory University - Treasurer), Harry Dangel (Georgia State University), Dave Ewert (Georgia State University), Dan Hagan (Georgia Southern University), Marilynne McKay (Emory University - Co-President), W.B. Mitchell (Georgia Southern University), David Muschell (Georgia College & State University); Carol Pope (Kennesaw State University - Webmaster); Anne Richards (University of West Georgia - Secretary), Brenda Hodges Tiller (Albany State University), Ted Wadley (Georgia State University), Holly York (Emory University), Dorothy Zinsmeister (Kennesaw State University).

1. Marilynne McKay welcomed the group and opened the meeting at 2:00 pm.

**2. COMMUNICATIONS COMMITTEE**

Carol Pope initiated discussion regarding several aspects of our communication as an organization. Although we have a website, Carol presented some ideas regarding how we might expand our ability to reach out to members.

- a. We could possibly create a newsletter that would enable member organizations to report what is going on at their school. Perhaps members of the Board of Directors could take turns preparing a summary of events that might be of general interest or specific to retirees. For example, musical performances at Spivey Hall at Clayton State; each of our schools holds at least one or two special events each year which might interest GA-HERO members.
- b. We have difficulty getting people to come to in-person events post-COVID. But if a particular school organizes an event of interest, we can invite other retirees to attend.
- c. We are trying to find interesting things to do, such as a Book Club, where persons can interact with one another.

Missy Cody: This would enable us to inform people about what's happening and let them know that they are welcome to attend events held around the state. And we wouldn't have to plan everything on our own.

Marilynne McKay: We could send out information about such things on the GA-HERO blog. Members could be notified every two weeks or so through a blog link.

Carol Pope: Someone will be spending a lot of time collecting this information in advance. Compiling it and making it public would be a huge job.

Marilynne McKay: This is why we thought that if Directors at each institution could handle publicizing what's going on at each institution, or, if they know in advance that something is happening, they could let Carol know.

Carol Pope: At our institution, we often don't know details about a particular event more than about two weeks in advance. Also, are Directors willing to take this on? If I say I need reports from your institutions, are you willing to send these to me? I wouldn't have the time to contact each Director individually. Could you do this four times a year? We can try it, see how it goes, and adjust the time frame as needed. Are there any other thoughts?

Dorothy Zinsmeister: One of the things our organization does is put on colloquia. This doesn't happen as often at KSU as it goes at Emory, but we would encourage others to join us if they wanted to attend. We've offered these in a hybrid format or face-to-face.

Marilynne: The Emory Colloquiums have returned to in-person meetings with Zoom links for those off-site. It's hard to break the Zoom habit, but people are slowly returning to campus. I was recently in charge of an Emeritus College seminar on Atlanta. It took a long time to get participants to sign up and agree on dates, then they didn't always show up to each other's seminars. We're hoping to make an OLLI course out of it later. Interestingly, three of our participants were affiliate (spouse) members of the EUEC (i.e. Ga Tech, Agnes Scott, Life University). I would like to invite colleagues from other universities next time. If we can encourage more people to attend, it would be more collegial and enjoyable. And we have a place to park for free!

Dan Hagan: I see the news of what various Georgia retiree organizations are doing as a vehicle for reporting what's being done elsewhere. This gives us something to imitate. I see the magnificent things others do and would love to go there, but many of our folks don't want to travel to something that is more than an hour away.

Marilynne McKay: You can see many years' worth of colloquiums as well as our biweekly newsletters on the Emory Emeritus website ["Resources" under [emeritus.emory.edu](http://emeritus.emory.edu)]. Our GA-HERO Cartersville meet-up last November opened my eyes to the kinds of things that are available in different corners of the state. Cross-pollination is a good thing.

Carol Pope: Shall we try this beginning Fall Semester? Our group doesn't meet over the summer.

Marilynne McKay: I'd say if something is happening on your campus, send out information about it over email.

Carol Pope: Many of our retirees want printed information about events to be sent to them. It may be hard to reach them online.

Marilynne McKay: I thought that the pandemic led many to do more online than they had done previously.

Carol Pope We have so few schools. Whoever is associated with a given retiree organization could print out the email and circulate it to others in their retiree group.

Mitch Clifton: If you just type information in an email, when it gets printed out it's often in very small text. If you had an idea that was going to be printed, I'd recommend it be accessible in a more readable form.

Marilynne McKay: perhaps it could be included as a PDF attachment.

Carol Pope: I would do the text in an email and attach a PDF as well. It's probably more accessible that way. A blog makes it easier to find things. You don't have to wade through all of your email to learn of something. Some retiree groups have used Facebook but that requires member signups.

Missy Cody: Anything we can do to engage people at different times and in different parts of the state is helpful. Let collegial friends and acquaintances know. If it alerts people to what's going on and gives them the opportunity to participate, that's a good thing. Email and a blog are extremely viable. Anything that gets people to check out the website is helpful. Sometimes people plan to participate in a Zoom meeting or other event, but then they injure themselves, or get a call from a grandchild. Even though they meant to be on the call, they might not actually do what they initially planned to do.

Thank you, Carol, for setting up the website blog. If we can expand the use of this, that would be better than starting something new.

Carol Pope: How will this work? Who will Directors send information to?

Marilynne McKay: Let's think about this and discuss at our next meeting so we can be more specific about what we would like for them to do. And if they want to find someone else to do this, that's OK too. I'm not going to publicize every single thing going on at Emory, but I'm sure we can share our biweekly Emeritus newsletter with other retirees. Let me see what we can do.

Missy Cody: We don't have anyone in GA-HERO from UGA, do we? But that doesn't mean we can't ask them for information. The chair of the USG Retiree Council (USGRC) could encourage this kind of sharing.

Brenda Hodges Tiller: At Albany State, we'd be glad to hear about anything like that happening. Our president is involved and a lot is going on there. She has cleared the way for a small core group of us going forward to work on creating a retiree organization.

### 3. RESOURCES PROJECT – for WEBSITE

***Planning for the Inevitable*** Will-making, estate planning, memorials, bequests,...

What is the best format for something like this?

(a) Recorded interviews on Zoom, with access on our website?

We could break interviews up into topical segments to make information easier to access. A possible topic might be intellectual property. What happens to that?

(b) What format should we be thinking about providing for others? Face-to-face?

Once a week for six weeks? As part of our meet-ups? Our original idea was to record interviews on Zoom that others could access. But someone has to conduct the interviews and record them.

(c) We could collect resources already online and provide links to these on our website. In discussion with a lawyer regarding "Planning for the Inevitable" the lawyer said he had noticed the Resources section on our website and said that, in addition to "25 Steps for Estate Planning" [now on our website, for example], Intellectual Property laws could be included as well. This would provide answers to basic questions so people wouldn't have to start from scratch on a given topic, but would give them a basis for asking further related questions.

(d) Other ideas? Marilynne McKay mentioned that all ideas presented above sounded terrific, but it will take time to get them in some accessible form or to read them once they are posted. Perhaps we should start with "What happens if I die without a will?"

Dorothy Zinsmeister: No member of GA-HERO should ever die without a will. We need to make that very clear.

Marilynne McKay: So we need a powerful statement at some point.

Carol Pope: If we could find a group or a lawyer – someone who could give members a discount in writing a will, this little bit of benefit might be a real draw. Do we have anyone in our group who is a lawyer?

Dorothy Zinsmeister: Do we have anyone in our group without a will?

Mitch Clifton: I have been working on arranging for one right now.

Dorothy Zinsmeister: John Bugge [founding vice-president of GA-HERO] had a will, but did not have a plan for his demise.

Marilynne McKay: And each of us is just a careless step or sudden stroke away from the inevitable. You never know.

Holly York: It's easy to put off all this planning. So it would be good to have information about it on our website.

Marilynne McKay: I have made contact with an eldercare, estate-planning lawyer who talks to groups all the time. So it's not difficult to have someone like that interviewed. We can do this via Zoom and edit the interview to get good answers on various topics. If it's like an Emory colloquium, where you can get good audience questions, this produces a good result.

Holly York: I attended this type of seminar. It does make you realize what's involved. But sometimes people don't go to events. If we have a committee interested in this project, we can ask those on it to look at a given interview and see what content is something they think others should have access to.

Marilynne McKay: Dan Hagan has volunteered to talk about donating your body for research. We really do need a committee, though, as these are a big topics.

Missy Cody: I'm glad you're working on this. My husband died of dementia almost two years ago. You need to make arrangements for wills, etc. before dementia is diagnosed. Certain conditions can keep you from doing things you want to do. It's not just dying that's the issue. I was lucky my husband had a will, and I redid mine one week after his death. I know of two Superior Court Justices who died without wills. Some people just think they won't die.

Carol Pope: The university System has organized a program as a post-retirement seminar. It might be very helpful to get ideas from that program. I'll be going to the one held at Chattahoochee Tech in Dallas, but it's held at different locations and at different times.

Anne Richards: The University System of Georgia has just put together a document detailing what information survivors should have following the death of a retiree. It was presented at the meeting of the USG Retiree Council on 3-31-23.

Marilynne McKay: Emory cuts off your email immediately after your death so your identity doesn't get stolen, but it means that no one can get your email contacts at that point. Colleagues can reach out to your department, retirement organization, etc, but that's not an individual's mailing list.

Missy Cody: This shows how important it is to get a good mailing list. Some in this meeting didn't get such a list, but the AROHE list is not that good either.

Gray Crouse: Something that could be added is to occasionally sponsor a seminar on Zoom by an elder lawyer for all GA-HERO. We could then provide the information gathered in different ways – on our website, as a webinar. It gives people a chance to get together. And if you have these done at different times, you hear different things. We could start with: “What happens if you die without a will?”

Dave Ewert: We should consider a fee for having a professional person of this sort. Others might pay to get to our group as an audience. An estate planner from Florida found us in the past.

Marilynne McKay: This is a good thing to explore and something we could record, if someone is willing to set up the Zoom part. Again, we need a committee to look at topics and timelines as well as procedures for choosing speakers.

#### **4. PLANS FOR SUCCESSION**

Marilynne McKay: Duplication of key officers like our co-Presidents is a good idea, but we need to go further. Identifying members to share duties or follow you as Directors is what we have in mind. Have you gone out to make such a plan? Dan Hagan has. He introduced Dr. W.B. Mitchell, Dean of Libraries Emeritus of Georgia Southern to our group. Dr. Mitchell is the current president of the Georgia Southern retiree association. He could be a wonderful candidate for the GA-HERO Board of Directors.

W.B. Mitchell: Not at this time, however.

Marilynne McKay: We’re a consortium of retiree organizations. Not every state has a retiree outreach like ours but consortiums are applauded by AROHE. If you have a bent for administration you might enjoy having a position in our National group. Dan receives the prize for doing the job we asked of our member organization representatives. Have others of you experienced any barriers in reaching out in your retiree organizations?

Holly York: When we last held an event, the room was only about half full.

Gray Crouse: One of the reasons we are not encouraging those outside of Emory’s organization to attend is that our room can only hold 60-65 people. Post-COVID we had only 10-15 there in person. More were on Zoom. This is what post-COVID looks like for us. Zoom is more convenient and less threatening. If your people are now conditioned not to want to attend in person, I’m not sure what that means about the future. On the other hand, we had people from out of state who showed up regularly to our colloquiums.

W.B. Mitchell: At Armstrong, our retiree organization holds an annual meeting where we get an annual report from the President and elect new officers. Our biggest challenge has been the consolidation of Armstrong and Georgia Southern—that has required us to reach out to those from there before we even consolidated. They never had a retiree organization. Right now they show no interest in joining those at Statesboro due to their sense that they experienced the consolidation as a “hostile takeover.” This has made it difficult for us to take in more members. I think we have to press harder for Facebook connections. There don’t seem to be people on the Armstrong campus to send out invitations to people whose participation shows they match a certain profile. Right now our inability to do this is making it difficult for us to achieve our mission. I’m finding the situation very distressing and disappointing.

Marilynne McKay: I tend to think that if you have a party, everyone will come, but that’s not working post-COVID. Even a wine and food reception isn’t enough of a draw. I’m starting to think networking is better accomplished one person at a time. And once you’ve met one person, you could say “I would love to meet more of you.” Or there may be a link made through reaching out or deputizing someone to reach out. Like fishing, you never know what you’ll catch when you cast your line.

Carol Pope: Kennesaw and Southern Poly consolidated. It’s taken two years. I’ve heard those from Southern Poly say they have no interest in what KSU does or in joining a group set up at KSU. They still identify solely with Southern Poly. The HR and Development offices would send out information but they won’t give us lists to make our own contacts.

W.B. Mitchell: We have reached out repeatedly to HR and received very little support. My two predecessors over three years got nowhere. These kind of disappointments do not encourage someone succeeding me.

Dave Ewert: There was a Perimeter College merger with Georgia State University. But because of the umbrella of GA-HERO – where both institutions were members prior to the merger – we knew each other. If we’re just talking about getting retiree organizations together, if we can get both to meet each other at GA-HERO, we might not have the problem Georgia Southern and Armstrong has.

Brenda Hodges Tiller: I’m happy to hear this because we have had a directive from the President to the Personnel Division that we will be provided with a listserv of retirees. We have to go through Legal Affairs. Not too much information can be given. But I just wanted name, email or physical address, and phone number. I knew many of those I called. It’s not easy because Personnel doesn’t want to provide too much information to you. So this conversation says to me that I better hurry up and get this information before they realize I shouldn’t have it. But I don’t see how you can do this without the backing of the University President or Provost.

David Muschell. Our retiree organization is in its 4<sup>th</sup> year at Georgia College & State University. Our first meeting was wonderful. 50-60 people attended. Then the pandemic hit and for two

years we have held virtual meetings that were not as well-attended. But last year we had our first live meeting again. Trying to get addresses is not easy. HR can get hostile at times. I met with our president and she went to HR. After that, they became more cooperative. Still, it was difficult to contact people. Several university emails were dead. HR doesn't keep up with them. Advancement has addresses but they don't always have the updated information we need. We have developed a legalistic form that has a place for a person to sign if they want communication from us. We convinced HR to put a letter from our organization and a t-shirt in the retirement packet – something that is friendly and informs people how we can help them in their retirement.

W.B. Mitchell: Our retiree organization is trying to do the same, but many retirees still don't know about us. I think it's important to have higher-up support. Last year we had over 100 attend our annual meeting with the President on the Statesboro campus. This year, most will not come to the Armstrong campus in Savannah to hear the President say essentially the same thing he did last year. Many can't be bothered to drive that far. I hope the poor RSVP totals will give us a reason to get presidential support for our group. This is one of the most frustrating professional experiences of my career.

David Muschell: We are similarly frustrated. Because of both the situation and the malaise of others not wanting to be active, I will be chair of our organization again.

Marilynne McKay: Such issues are also why I encourage people to think immediately of replacements or mentees. We're at a stage now where many don't know about AROHE. We see the same faces over and over at our meetings. Younger retirees have a lot of other things to do.

Dorothy Zinsmeister: Can you provide an update on what AROHE's plans are for a meeting in the future?

Marilynne McKay: AROHE has a meeting coming up in the next couple of months. I'm not yet sure if it will be face-to-face or virtual, but information about it is or will soon be on the AROHE website.

## **5. NEXT MEETING**

Marilynne McKay: We'll probably schedule another meeting toward the end of summer.

## **6. ADJOURNMENT:** The meeting ended at 3:10 pm.

Respectfully submitted,

Anne C. Richards, Secretary