

Final Report of 2012 Meeting of Big Ten Retiree Associations

The annual meeting of the Big Ten Retirees Associations took place on the campus of the Ohio State University from August 3 to 5, 2012. The theme for this conference was “Growth and Development of Universities Retirees Associations” and its purpose was to provide opportunities for participants to share information and learn from one another strategies for fostering the growth and stability of our associations. As the conference host, the Ohio State University Retirees Association (OSURA) organized the content of the conference and focused on four aspects that contribute to a healthy organization: membership, programming, support and communication. The pages that follow capture many of the comments and questions that were discussed in the sessions.

There was a dedicated committee that began the planning for the conference in the fall of 2010. That committee included the following: Lou DiOrio, Francille Firebaugh, Howard Gauthier, Rai Goerler, Dick Hill, Diane Selby, George Smith, Marie Taris and Nancy Wardwell.

A mere three days prior to the beginning of the conference, a tragic accident took the life of one of the members, Lou DiOrio. Lou had been central to the planning of this conference, a long-time supporter of OSURA and had co-chaired the conference when it was last hosted at OSU ten years ago. We remembered the many contributions of Lou DiOrio throughout the conference.

Questions about this report can be addressed to the conference chairperson, Marie Taris, or the President of OSURA, Diane Selby.

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Planning and Financing the Conference

In the fall of 2010 The Executive Board began discussions about the Big Ten Retirees Associations conference to be hosted by OSURA in 2012. Eight or nine members of the OSU Retirees Association, mainly from the Board volunteered for the planning committee. By January of 2011, after review of several possible venues, that committee made decisions about the dates and the location for the 2012 conference.

There was considerable time devoted to finding an appropriate focus for the conference. All agreed that the conference should provide information that participants would view as beneficial and could take back to their respective associations. Nevertheless, the committee discussed many topics of possible interest in the ensuing months. Not until three of the planning committee members attended the conference in Madison in August 2011 did we identify the subject we thought we should address. We decided that for 2012, it would be most beneficial to concentrate on ways that each organization could strengthen their association, through sharing among ourselves. This decision drew also upon a member survey that the Wisconsin association had conducted in the spring and distributed at their conference.

Financial planning took place even before decisions about venue and topics. Following the 2002 conference at Ohio State, the Executive Board of OSURA decided to set aside funds for the 2012 conference at the rate of \$1,000 per year. Thus the planning committee for the most recent conference was assured that sufficient funding, as much as \$10,000, would be available to cover the expenses associated with receptions, special meals, entertainment, meeting space, equipment, miscellaneous items, etc.

We followed the lead of recent host institutions of setting the cost for registration at a level that would cover most of the meals at the conference venue, which was determined to be close to the amount of the registration fee in the prior two years, or \$125.00. We also decided that members of OSURA who planned to be full participants in the conference would pay the same registration fee as the out-of-state participants, and those with limited roles would have pro-rated fees. Although not all the invoices have been received for this conference at the writing of this report, it appears that the total cost is approximately \$9,400, less approximately \$4,200 in registration fees received. We were able to stay well within our anticipated budget, thank to the generosity of the President of Ohio State University, who hosted the Friday night dinner.

Narrative Summary of Program as printed in the OSURA Newsletter (September 2012):

OSURA HOSTS BIG TEN RETIREES

Not everyone was watching the Olympics in London during the weekend of August 3. On that day, twenty-two representatives of the Big Ten Retirees Association gathered at the Blackwell Inn for the annual conference. Eleven organizations sent delegates, some of whom came from states as far away as Nebraska and Pennsylvania. In addition, John Meyer of the Association of Retirement Organizations in Higher Education attended. Each participant received a bag that included not only information about the event but brochures of Columbus, a map of campus, a handsome notebook, and a coffee mug filled with buckeye chocolates. For OSURA, the conference was an opportunity to showcase the University and our organization, as well as to share information and exchange ideas.



A reception and



dinner at the President's Residence kicked off the meeting. President E. Gordon Gee himself greeted each guest. After dinner, he stated that retirees were important assets for the University, ones that he valued greatly. The setting as well as his words served to point out the value of OSURA to OSU and of the University to OSURA. Further evidence of that mutually helpful partnership was the presence of OSU's Vice President Kathleen McCutcheon and Associate Vice President David Green, both of Human Resources. Songs by the student group "Buck That" brought an end to a grand evening.



The only somber note of Friday was the announcement of the accidental death of Lou Diorio, a few days before the meeting. He was a former president of OSURA, had played a key role in founding the Big Ten Retirees Association, and had helped to plan this meeting.

On Saturday, the conference began and addressed its theme "Growth and Development of University Retirees Associations." Each of the sessions that day and on Sunday focused on ways of strengthening retiree associations. David Green introduced the topic by talking about the financial and programmatic partnership of OSURA and OSU. During that day and the next,

panelists and their audiences discussed “Enhancing Membership”, “Programming—What Works,” “Financial and University Support,” and “Effectively Communicating with Retirees.”

Most of the sessions followed a common format. A panel discussed a topic and many members of the audience participated. However, the session on Saturday afternoon that concerned financing of retiree associations had attendees form three groups. Each group rotated to a different discussion leader and offered ideas about the topic addressed. Thus, each person had an opportunity to participate fully in each of three topics related to financing of retirees associations. This approach was well received.

Informative sessions alone do not a successful conference make. This meeting had a bus tour of campus that featured the variety and breadth of research taking place at OSU, a visit to the Ohio Union, and a tour of the Thompson Library. Saturday ended with a dinner at the OSU Faculty Club. Here, people enjoyed both a dinner and a taste of OSURA’s monthly programs that feature a dinner and a speaker.



For that evening, Dick Hill discussed James Thurber, the Columbus born and nationally prominent author, humorist, and cartoonist. In his youth, Thurber suffered an injury, an arrow in the eye that eventually led to blindness. Using slides and drawing on his extensive knowledge of Thurber and of optometry and ophthalmology, Dean Hill discussed the injury and compared similar cases. He speculated about how modern science would have saved the vision of James Thurber. Although the subject was serious, the presentation both informed and entertained because it included cartoons by Thurber.

On Sunday, a business meeting ended the conference and introduced the annual meeting for next year. Before returning to their states, participants wrote evaluations that about the meeting and related events. All agreed that OSURA had set a high standard for the meeting of the Big Ten Retirees Association at Ann Arbor in August of 2013. Credit goes to OSURA’s planning committee, to OSU staff Diana Lantz and Michelle Bondurant, to volunteers, and especially to Marie Taris who led the effort. Thanks and “Go Bucks!”

Program Brochure:

Big 10 Retirees Associations

Annual Meeting

August 3 to 5, 2012

Growth and Development of University Retirees Associations

Hosted by



OSURA | Ohio State University Retirees Association

Program

Friday, August 3

3:00 - 5:45 pm Conference Registration; Hotel Check-in

Lounge of Blackwell Inn (refreshments provided)

5:45 Board bus for transport to the residence of President E. Gordon Gee

6::30 Cocktail Reception

7:00 Dinner

8:30 Bus transportation back to Blackwell Inn

Saturday, August 4

7:30 - 8:30 am Continental Breakfast

2nd Floor Pfahl Hall

10:00 Business Meeting

11:30 Conclusion and “Grab and Go” Lunch

Summary of Opening Remarks by David Green, Associate Vice President, Talent and Workforce Acquisitions at the OSU Office of Human Resources

David Green welcomed all participants to OSU. He discussed the partnership between OSU and OSURA which is viewed to be beneficial to both organizations. Key points were:



- Through a letter of agreement, a framework has been developed defining responsibility between OSU and OSURA.
- OSURA is a line item in the HR budget.
- OSU contributes \$40,000 annually in support of OSURA.
- HR also provides additional resources including a half-time university employee and student support; facilities; technical support and guidance; maintenance of the website; and social media strategies such as face book
- Now starting to collect information on retirees before retirement.
 - Pre-retirement packet
- Periodic meetings are held between the HR and OSURA leadership.
- HR and OSURA have shared goals of visibility and sustainability.
- Challenges
 - Scarce resources
 - Privacy issues
 - Retention of retirees
 - Tapping into retiree wealth of expertise
 - Reemployment policies

Report of Session - *Enhancing Membership*

Panel Presentation/Discussion Group: 9:30 to 10:30 Saturday, August 4, 2012

Panelist included: moderator, Marie Taris, Ohio State University; Jerry Hull, Michigan State University and Jack Goebel, University of Nebraska

Panel members began the discussion by sharing information about their own association. Marie Taris indicates that OSU provides a one year complimentary membership to OSU faculty and staff (and



spouses) for their first year of retirement. After the first year, members pay annual dues of \$20. A lifetime membership is available for \$225. Membership currently stands at about 4,000. The Office of Human Resources identifies individuals who are retiring, and the OSURA office sends them information and an invitation to join. The association relies on the annual membership drive to obtain current member information. A recent survey was completed by the members to determine how members prefer to receive association information.

Jerry Hull shared that anyone who retires from MSU becomes a member of their association, and membership level is approximately 4,200, although not all are active. While there are no annual dues, members pay \$10 to subscribe to the newsletter. Sponsors such as the credit union and Blue Cross/Blue Shield can donate to the MSU retirement fund.

Jack Goebel stated that UNL has a total of 848 members, 596 of which are active. The association is open to faculty and administrative staff who have emeritus status and emeritus status is defined by the U of Nebraska system office. Nonacademic staff is not currently eligible to be members, although there has been some discussion of redefining membership. The association is supported by dues and through the University Foundation.

The discussion was opened up to audience. When first founded, Michigan's association was for faculty only, but has grown to include all retirees. Every association except Nebraska currently includes both faculty and staff.

The panelists next addressed benefits of their associations. Marie Taris indicated that the monthly Newsletter and the variety of programming is a draw for many of the members. The Newsletter and the website routinely carry information about pension reform in the State of Ohio. The Ohio General Assembly is currently examining ways to maintain sustainability of the

public retirement systems in Ohio, including the two that impact OSURA members, the *State Teachers Retiree System* and the *Ohio Public Employee Retiree System*. Taking advantage of their large membership, OSURA has been involved in advocacy for responsible changes and keeping members updated. At MSU, the pipeline to reach out to its members includes the university president sending a letter to each retiree asking them to participate in the association. Monthly meetings with programming on topics of interest are held for the retirees and there is a core of members who attend regularly. The UNL association provides scheduled luncheons with speakers and receives university support through the alumni association and human resource departments which pick up expenses and provide additional resources.

Retention of members was next addressed. Since health benefits are provided to retirees, the MSU human resources department maintains updated address changes which are shared with the association. All retirees maintain a university email address.

Participants identified issues in maintaining contact with retirees. It is difficult to maintain current member email and home addresses. Associations must be sensitive to retirees who do not want to be contacted, and many retirees do not read email. Retention of recent retirees continues to be an issue across all associations and we are all looking for ways to contact and involve the newly retired.

The session ended with participants discussing the opportunity for universities to develop strategies to utilize retiree expertise.

Report of Session - PROGRAMMING --- WHAT WORKS?

Panel Discussion Group: 10:45 to 12:00 Saturday, August 4, 2012

Panelists included: Moderator, Diane Selby, OSU; Pat Butler, University of Michigan and Judy Craig, University of Wisconsin-Madison

Participants in the conference shared information about programs of their associations without regard for the success being measured by number taking part in the activity. The intention was to help associations answer these questions:

1. How do you know what your membership wants?
2. How do you evaluate a successful program so you know if you want to repeat it again?
3. What is the mission of your association and does your programming match that mission?
4. What worked well this past year?
5. What was not so good – pitfalls to watch out for



Each of the three members of the panel described one of the programs of her association.

“Health Day” – Pat Butler, University of Michigan

This program has been held since 2006 with University staff presenting information on five topics of health care. No honorarium or stipend is paid to the presenters. Grants from the University cover the costs for the program and the only charge to those attending is for their lunches.

“Financial Matters in Retirement” – Judy Craig, University of Wisconsin-Madison

The programs of the UW-Madison Retirement Association are carried out through committees which the association considers to be the key to long-term success. Speakers are from the University; some are retired, some are not. For the presentation at this Big Ten meeting they identified the series of financial seminars offered by the Committee on Financial Matters in Retirement: Monthly seminars during the academic year at a location near the University with “easy parking” and no cost for use of the facility. Craig focused on one program in this series, “Continuum of Care Retirement Communities in Madison.” A member of the committee had interviewed managers of the three types of housing facilities and presented his findings on such features as size, cost, services; this session was followed by a panel of members living in these communities.

“Embracing Retirement: Staying Connected!” – Diane Selby, The Ohio State University

This annual conference is held on the third Thursday of September with the intent to provide information at the Open Enrollment period on health care benefits offered by the retirement systems. This information is presented by representatives of the two retirement systems at the end of the all-day meeting. The day’s program starts with a keynote speaker or panel followed by break-out sessions before and after lunch. Speakers/presenters do not receive honoraria and conference attendees are charged for the luncheon.

Other programs from all associations:

- “Planning Your Last Road Trip” – some 125 decisions to be made prior to one’s death.
- “Grandparents University” is not a program of the University of Wisconsin Retirement Association, but a group of that institution’s alumni. It is a two-day program focusing on one “major,” but includes contact with the larger university. The grandchildren are ages 7 to 14. Parents are not allowed to participate as it becomes a bonding time between grandparents and grandchildren.
- The Ohio State University Retirees Association’s special interest groups were explained. The Book Club meets monthly eight times a year to discuss a book selected by the members even though it is not necessary for an individual to have read the book; there is no charge. (Members who cannot attend the meetings can read the book which connects them to the group in a way.)The Photo Society is a group of individuals interested in photography, but the focus of their meetings is not on its technical aspects. Litter Pickers

clear debris four times a year in an area assigned by the Ohio Department of Transportation. The Travel Committee is very active planning trips throughout the state, other parts of the country, and internationally. There can be some connection between special interest groups such as a trip to the homestead of U.S. President James Garfield in northern Ohio planned by the Cultural Arts Committee and the Book Club's discussion of *Destiny of the Republic: A Tale of Madness, Medicine, and the Murder of a President*, about how his death through medical bungling and political machinations changed the course of U.S. history.

- The University of Iowa offers a course every spring on one of the Shakespeare plays to be presented that summer.
- The University of Wisconsin has an ad hoc program "Italy One-on-One" in October.
- The retiree association at Pennsylvania State University is the "sole provider" of benefits information to its members.
- Michigan State University offers programs on a wide variety of topics and finds the members participate because of interest in the topic or to socialize ("endure or enjoy").
- Iowa State University finds tours of new facilities on campus attractive. The new art center, the flood recovery efforts, and the athletics facility were mentioned as well as a program on brain science research at the health center (e.g., understanding and current treatments in Alzheimer's and Parkinson's diseases).
- Another program was a presentation by an editorial writer on how government and university relations are seen by the public and the press.
- Retirees are automatically enrolled as members in the Indiana University Club and participate in their programs. In September, a person who is not a politician will speak on understanding politics and elections.
- A music program by a class of about 30 African-American students was very popular. People were brought in by bus to attend.
- "The Road Less Traveled" was a program presented for Michigan State University employees who were planning to retire in three to seven years. It covered such topics as estate planning, health benefits, financial planning.
- A one-day program on TIAA-CREF and Social Security was popular.
- University of Wisconsin plans two or three programs a month. They are organized by the various committees which has identified members' interests. Only the monthly luncheon is for everyone.
- The Ohio State University has monthly breakfasts, lunches, and dinners.
- Every travel program The Ohio State University Retirees Association sponsors has a minimum number of participants. If fewer register a decision is made as to whether to go with the event or to cancel it to meet expenses.
- An Awards Banquet is held at Pennsylvania State University at which scholarships are presented, often in gerontology. It is a way of doing something for the institution.
- A program for new retirees included presentations on Social Security and the retirement system.

- Vendors exhibits at The Ohio State University's Embracing Retirement: Staying Connected! Conference helps offset the costs.
- One of the popular monthly programs at the University of Michigan was an undergraduate student's presentation about the solar car program and the race in Australia. Members enjoy hearing from the students.
- A program with five people representing the various Armed Services and a nurse in World War II who had written a book was interesting.
- A social time (with refreshments) after meetings is popular.

Some general comments:

- In response to question about whether the retiree association offers programs because they are not available elsewhere, it was thought that members participate because of the social aspects as well as other reasons.
- People who retire in their fifties do not consider themselves retired and it is difficult to provide programs which balance the interests of different age groups.
- Transcripts/reports, evaluations, and multiple screens in the meeting space are helpful.
- Convenient parking is a plus.

Report of Session – *Importance of Obtaining Financial and University Support*



Discussion Groups: 1:00 to 2:30 Saturday, August 4, 2012

OSU Discussion Group Leaders included: Francille Firebaugh, Howard Gauthier and Dick Hill

This session focused on three areas of importance to growing and strengthening the retiree associations in the Big Ten Conference. Each member participated in a format of three successive small discussion groups. The topics were: 1. Membership dues, 2. Enhancing revenues, and 3. University support. This report provides an overview of the outcome of the group discussions. It presents the consensus views of the participants on the challenges and opportunities that the associations face in enhancing their service to university retirees.

Challenges and Opportunities:

- Many retiree associations face challenges in either obtaining or increasing financial support from the university. This underlines the need to secure at the administrative level one or more champions of retirees.
- Securing financial support is never easy, but there are actions that can be taken.
 1. Document retiree efforts to generate support of the university's priorities such as financial contributions to the university and to the university's charitable drives and volunteer hours.
 2. Document retiree efforts to generate support for the university's priorities among legislators and the general public.
 3. Increase the visibility of the association on the campus by participating as members or observers on important university committees, such as the university senate, staff and faculty benefits committee and committees that oversee the university's internal fund raising efforts.
 4. Develop regular meetings between the retiree association leadership and the president of the university if at all possible. Also, consider strengthening relations with the leadership in Human Relations, the Alumni Association and the Development Fund.
 5. Use the meetings with the university leadership to determine the needs of the university for retiree assistance. Discuss what the retirees are already doing for the university. Make the case for preserving and enhancing retirement benefits, such as parking and the use of the library, athletic and other facilities for all retirees. Devote part of the meeting to make the case for university assistance for the association.
- Explore the possibilities for securing support from the leadership of the Development Fund to include the retirees association as a recipient of endowment contributions. Help them see retirees as donors and as fiscal assets to the university. Encourage members to recognize that their donations are an important way to be continuing and useful members of the university community.
- Enhance the contributions available through sponsorships for your programs and, events. Possible sponsors are health insurance companies, senior housing and retirement communities and credit unions. Any organization and association that provide services for retirees is a potential sponsor.
- The inclusion of advertisements in the association's publications is another possibility, if done in a limited fashion to avoid the appearance of commercialization. The ads can be limited in number to services that retirees need and want.

- The payment of dues should be considered as one way to help defray the expenses for the newsletter, directory, room rentals and general expenses. Dues may be scaled to consider membership differences—new retirees, annual members, life members—with discounts given to those members who prefer Internet copies rather than printed ones.
- Many social, cultural and educational programs offered by university retiree associations do not yield sufficient revenue to contribute to the finances of the association. Dues, as well as fund raisers, provide important opportunities to offset some program costs, enhance revenues and allow for the introduction of new programs that will attract new members.
- Dues should be evaluated on a regular basis so increases can occur gradually rather than in large increments. It is useful to consider dues as a way to project a positive image of retirees with a common commitment to a mission, vision and purpose.

Finally, it is helpful to consider all of the above as ongoing projects and that the necessary relationships need to be constantly nurtured. Most importantly, don't take 'NO!' as a permanent answer.

Dues: *Do We Need Them (& Why) ?*

Leader Dick Hill (Recorder Lee Hill) (Notes from flip pages)

Each rotation opened with four "Trigger Questions" (1-4), then ended with the "Other" category (5)



1. *What Are The Core Purpose(s) of Dues? [Common Uses Identified]*

Newsletters, Directories, Web-sites, Copying, Mailings, Equipment, Room Rentals, Subsidies [*meetings, luncheons, representative expenses, use fees*]

2. *What Is A "Right" Dues Level?*

What Can You Justify [*inflation considerations, special expenses, new programs . . .*]
 What Can Your Members Pay [*pension differences, scaled dues, a "green" discount" **]
 Regular Small Increments [*vs. longer periods and bigger jumps*]
 Dues Collection Challenges and Costs [*use of dues date code on mailing labels?*]
 Best Ratio of Annual Dues to Life Membership [*ranged from no dues to 1:15*]
 Options [*annual only, annual and life, or no dues*]

3. *What Fiscal Oversight/Management Is Advisable?*

Officers [*Treasurer, Budget and/or Finance Committee Chair(s)*]

Systematic Documentation [*monthly or quarterly reviews of income and expenditures*]
Annual Audit [*reports filed with oversight offices*]
Tax-Exempt Status, Tax-number [*file forms as may be required*]
Abide by Current Records Retention Schedules [*of parent institution, state, federal*]

4. *What Image(s) Do Dues Project?*

Psychological Factor [*value “felt” and “seen”*]
Image Projected [*buy-in, cohesion, commitment to a mission, vision, purpose*]
As a “Marketing” Factor [*benefits over-valued, under-valued, just right?*]

5. *Other Considerations?*

Cost Neutral Guidelines for Fiscal Control of Ongoing and/or New Activities
Mission/Vision Statements [*important for balancing costs vs. objectives*]

- * No printed/mailed documents, only e-mail copies

Notes from flip pages of discussion Group Concerning Creative Ways of Enhancing Revenue

(Leader Francille Firebaugh; Recorder Rai Goerler)

1. *Building Relationships with universities and university Development*

- a. Need to persuade universities to see retirees as donors and as assets
 - b. Need to persuade retirees to see themselves as continuing and useful members of the university community
 - c. Get credit from university development for gifts of retired faculty and staff
 - i. Gifts that provide scholarships
 - ii. Gifts that support research
 - iii. Gifts that are legacies of an estate
 - iv. Gifts that support the retiree’s association
 - v. Gifts that enhance the university generally
 - d. In the case of Minnesota, university provides research funds for the retirees to support research and conference attendance. This suggests that senior university officials may be receptive to support initiatives presented by association leaders.
 - e. Purdue Retirees Association receives funds through its university from health insurance companies that under perform
 - f. Universities do furnish spaces for meetings, but parking is often a problem
2. *Use of advertising and sponsorships*
- a. Health Insurance companies are likely supporters
 - b. Senior Housing are ones also

- c. Credit unions have sponsored programs and events
 - d. In some cases, such companies will provide meeting space for organizations without charge
 - e. Some companies are willing to donate take-away items at meetings (notebooks, pens, etc.) that have their logos
 - f. Some retiree associations do not want advertisements in their publications. Ohio State has only recently begun to advertise in a limited fashion to support its monthly newsletter. Fear of over-commercialization is common.
 - g. No one has had experience with web advertising.
3. *Developing revenue from programs*
- a. Most programs yield insufficient revenue to be a financial base for the organization as a whole. OSU Travel Committee, as an example, gains enough income to provide a buffer in the event of initiatives that are not successful financially.

Group 3. Discussion Leader—Howard Gauthier. Topic—University Support (Recorded by Tom Sweeney)



I. Notes from the flip pages taken at the meeting:

First session:

- Need for University Support.
- A Champion!
- Strategic Plan—funds based on plan.
- President of university.—letter to key campus leaders asking for support of

retirees.

- Development funds.
- Start at the top.
- Retirees contribute \$ to the univ.—scholarships, memory books.
- Univ. “use” retiree orgs to convey bad news on benefit reductions.
- Tax deductible gifts can benefit retiree associations.

Second session:

- Two newsletters to all active employees and to all retirees with costs paid by university Foundation.
- Volunteer exec director.
- Hard to get donation numbers from university.
- Alumni association has been helpful.
- Cash & staff help when university president inspired the start of the retiree association.

- Donations from vendors and others for special needs.
- Endowment funds have helped the organization itself and have provided scholarships.
- Some retiree associations have small needs and require little or no university support.

Third session:

- Retirees make substantial contributions to the university and to United Way.
- University provides financial support, staff, and help with health plan selection.
- Turnover in administrative positions at the university is a problem.
- Get retiree members on all relevant committees, e.g., Senate, Benefits.
- Space and part time secretary and “grants” for special needs.
- Try to record total volunteer hours.
- Dual retiree organizations—emeritus organizations get more support.
- One retiree organization is a local chapter of the state pension system.

II. Reflections on important points made during the three sessions:

- Find one or more champions at the university.
- Develop friends and allies among the staff and faculty.
- To the extent feasible, serve all retirees, not just dues paying members.
- Document retiree support of the university and of the community such as financial contributions to the university and to the university’s charitable drives and volunteer hours.
- Document retiree efforts to generate support of the university’s priorities among legislators and the general public.
- Document the needs of the retiree association such as financial, space, staff assistance needs.
- Participate as members or observers of important university committees, such as the university senate, staff and faculty benefit committees, and committees that oversee the university’s internal fund raising efforts.
- Develop regular meetings between retiree association leadership and senior university leadership—the president of the university if at all possible. Also, HR leadership and Development Fund leadership.
- Use the meetings to determine needs of the university for retiree help. Discuss what the retirees already do for the university. Make the case for preserving and enhancing retirement benefits such as parking and the use of library, athletic, and other facilities for all retirees. Use a portion of the meetings to make the case for university assistance for the retiree association.

Recognize that all of the above are ongoing projects and that relationships must be nurtured. Don't take "No!" as a permanent answer.

Report on Session – Effectively Communication with Retirees

Panel Presentation/Discussion Group: 8:45 – 1:00 Sunday, August 5, 2012

Panelist included: moderator, Rai Goerler, OSU, Fred Beutler, University of Michigan; Sue Hiser, Purdue University

Discussion began by focusing on specific questions. Each panelist responded to a question with comments from other panelists followed by participation by the audience.

QUESTIONS:

1. *What kinds of information do we want to communicate to our members? When do we have doubts about the propriety of sharing?*



Fred Beutler- Information- Benefits, Retirees Achievements of the university services for retirees; Healthful Living, Housing, Local Matters, and Cultural Activities. Boundaries- stay away from Politics and Commercial Information.

Sue Hiser- Use website. www_Purdue-retirees.com. Have over 4,000 members. Most do not connect with computer. (25% use computer). Newsletter four times a year. Website being updated. Not using Facebook yet. Topics for communication include Health Benefits and events. Boundary- Volunteer Areas- Boiler, and Employment.

Rai Goerler- Passed two handouts: (1) Abstract of Communication survey by OSU, 2012 Retirees Assoc. (2) Big Ten Retirement Assoc. Survey, 2011.

How do we keep non-digital members? OSU is using Ads to help defray costs for our monthly newsletter.

A Task Force is being arranged to set up Volunteer opportunities for the University and Department projects. Email listservs for –special interest groups (i.e.) CulturalArts, offered to retirees. Those who retired 20 years ago don't use Email. If you had an Email address at OSU you can keep it after you retire. Have active committees that include travel, cultural arts, and social as well as special interest groups such as book club, litter pickers, bridge club.

Boundaries-concern about political and religious discussions on Face Book but this had not taken place yet.

2. *Is there a Communication technique that works best?*

Fred- Monthly Meetings-10% attend (100 out of 1,000) Medical Benefits Programs are popular.-Email Notice, Newsletter, Word of Mouth, "Face to Face". Web Page- 6,000 hits one month. Newsletter on Web Page. Can be distributed to non members through Web Page. Timing of newsletter can be a problem. Expand Email for timely reminders.

Sue- Newsletter (quarterly) hard copy appreciated. Email, Announcements at meetings, Flyers, and Personal Contact. Use Email to announce Flu Shots (great way to update Email

Retirees provide Address or have retirees sign up their Email address).

Rai- Passed OSU survey and referred to the 2012 survey. A deadline works well. Email used as a supplement, not replacement of Newsletter. Retirees can opt out of Newsletter (not very successful, only 200-300 opt out).

3. *Do Email Newsletters work well? Are they an adequate replacement for printed Newsletters?*

Fred- Print out Emails- cost is paid for by retirees than our association. \$10.00dues can get aprinted copy . Can get the Newsletter on Email free. Use Volunteers to mail out Newsletters.

Went from 4- 3 Volunteers to mail Newsletters when we used Email delivery.

Sue- Many retirees file Emails and don't read the Newsletter. More effective for those who Use Email for communication. Purdue does not charge dues. Publish 4 Newsletters a year.

Rai- Referred to OSU survey #3 for response. Email 56% while Newsletter is 93.8%

4. *Are organizational websites effective as a means for communicating with retirees? What Makes a website effective?*

Fred- Big 10 Issues of Newsletters. Constitution answers questions and concerns of the Association. Un. Michigan retirees control their website. A member of their Board has a continuing job to keep website updated. Use the website to announce meetings.

Sue- Website is controlled by University media and is updated by them. It is not th university's top priority. Retirees not in control of the website.

Rai- OSU website is maintained by Human Resources of the University. It does require updating and re-design, which would be done as part of OSU's HR area. .

5. *Is social media an opportunity to connect with members? If so, which has been used (Facebook, Linked-In, blogs, et al.) survey of members.*

Fred- Facebook- Personally not inclined in this source of communication. More trouble than it is worth.

Sue- Have not developed Facebook.

Rai- Facebook is in early phase at OSURA. They have 60 new members. Challenge to capture and keep members. HR has asked us to be a Trial Group. They have provided us

staff members, a grad student intern. Relatively easy to set up because OSU's HR provided help; more work in maintaining and encouraging the sharing of content.

Through social media, we want people connected both to OSURA and to each other.

6. *How do we keep our non-digital members engaged? Do we attempt to orient them to digital communication?*

Fred- Un of Michigan 30% retirees have Email addresses and 60% that we know about do not have Email. We are trying to increase the number of Email addresses. Email gives timely information. We are not on Facebook and presently not encouraging this form of communication-“junk” too over whelming. We can orient, but some do not want to be oriented Members still want to be reached by mail. There is no magic bullet. HR gives us addresses of retirees to join our association. Many groups of classes over the Un. Committees use this information.

Sue- 75% of Purdue retirees are engaged. Students carry out projects-set up internships

Rai- Facebook Group Page. Periodic campaign. Pension Reform news. Membership limited . We can remove people from Facebook. Facebook is not effective for all retirees. Adapt to those who you need to communicate.

Email gets to retirees more quickly and timely.

SUGGESTIONS FROM AUDIENCE

- Go to Libraries to get orientation to computers and social media.
- Newsletter- provides historical information. Need the printed copy.
- Try to figure out how to affiliate with HR.
- Remind volunteers what they can do and what they can not do.
- Association Board of Big Ten Retirees not getting younger. Need to recruit younger members.
- Grandparents are the fastest group using social media to keep up with their grand-

children.

Membership Forms- ask for interest and skills to compile. .

- OSURA used Postal Card as a reminder of Membership Dues. Brutus Buckeye was on the card. This was very successful.



Notes from Big Ten Retirees Association Annual Business Meeting

Meeting: 10:00 to 11:30, Sunday, August 5, 2012

The 20th annual business meeting of the Big Ten Retirees Association was called to order at

10:00 a.m., Sunday, August 5, 2012, by Diane Selby, President of OSURA, the host association for the conference. Those present for the meeting included: John Adams, Minnesota; Fred and Sue Beutler, Michigan; Don and Pat Butler, Michigan; Sharon and Thomas Conry, Illinois; Judy Craig, Wisconsin; Don Gentry, Purdue; Jack Goebel, Nebraska; Sue Hiser, Michigan State; Jerry and Suzanne Hull, Michigan State; John Meyer, AROHE; Don and Katie Rung, Penn State; Eileen and Jim Schellhammer, Indiana; Ron Smith, Michigan State; Ken Starck, Iowa, Nancy Williams, Iowa; Diane Selby, Howard Gauthier, Marie Taris, Dick and Lee Hill, Rai Goerler, Francille Firebaugh, Ohio State.

Review of the constitution and bylaws

Participants received copies of the constitution and bylaws in their packet of materials and were asked to review the same. Discussion was opened for any changes. None were suggested.

Discussion of how to keep the Big Ten Retirees Association website current

Pat Butler, Michigan, moved, it was seconded, and passed unanimously to express sincere appreciation to the Webmaster, Fred Remley for his dedication to the Big Ten Retirees Association Website. The Big Ten Retirees' Associations website has been hosted by Michigan, and Fred Remley has maintained that site for a number of years.

Pat Butler, Michigan, moved it was seconded and passed that on the Website Association Directory where there is a link to each individual organization that the name and e-mail

address of a contact person be listed directly under the listing of the association. Also, it was recommended to add individual logos of our associations to the website, as per the name badge used at this conference.

Pat agreed to ask webmaster, Fred Remley, to remind each association annually to update the contact information. Everyone was reminded to forward updated information through the Website immediately as it can only be as current as the information that is sent. Each organization is also reminded to update their own Website because they are linked by the Big Ten Website for current information.

In discussion of what should be on the Website it was agreed that it should remain much like it is currently, including the reports for all the annual meetings. It was noted that some reports are missing, including the report from the 2011 conference in Wisconsin; some effort will be made to locate and forward prior reports for posting on the website. There was interest expressed that the conference summary reports should include the conference schedule along with photos taken during the conference.

In addition, those present suggested they would like to see information on the website in advance about the next conference and that it should include registration information

Is there interest in having better communication among our associations on an continuous basis?

The answer was a resounding “yes” to stay in touch and establish e-mail contacts with each organization throughout the year.

Review of the annual conference Rotation Schedule

Judy Craig, Wisconsin, moved, it was seconded and passed unanimously that Nebraska be added to the conference annual rotation schedule for the year 2016. The following is the schedule for the next eleven years:

- 2013 – University of Michigan
- 2014 – University of Minnesota
- 2015 – Michigan State University
- 2016 – University of Nebraska
- 2017 – Purdue University
- 2018 – Penn State University
- 2019 – University of Illinois
- 2020 – University of Iowa
- 2021 – Indiana University

2022 – University of Wisconsin
2023 – Ohio State University

Concluding remarks

Don Gentry, Purdue, pointed out that there is a pamphlet in our packets called Retire Smart, and suggests that we all need to keep our eye on the changing benefits and health care and that we might profit by joining together to address health insurance needs.

John Meyer, of the Association of Retirement Organizations in Higher Education (AROHE) made remarks. He noted that several associations within the Big Ten are already members. The Association holds a conference every two years, garners data from members for surveys, and collects best practices. Membership fees are proportional to association budgets. There could be a possibility for a membership that would represent the Big Ten Association.

By acclamation, Marie Taris, Ohio State, was commended for a terrific job as chair of the 2012 Annual Conference.

2012 Conference - University of Michigan scheduled for August 9-11, 2013

Marie graciously passed the torch (a large yellow Duck) to Pat Butler, Michigan, to keep the association afloat as host of the next conference in 2013.

Pat Butler warmly invited everyone to University of Michigan August 9 – 11, 2013 where the topic will be “Purpose in Retirement.” Delicious Michigan fudge was distributed as the conference was concluded.



EVALUATIONS FROM BIG 10 RETIREES ASSOCIATION, August 2012

OVERALL THE CONFERENCE WAS:

EXCELLENT- 15

VERY GOOD- 1+

FAIR- 0

POOR-0

Thanks for an excellent conference-very well done!!

I PARTICULARLY LIKED:

- Program suggestions. More information on most popular topics for membership.
- The interactive participation was great. Your preparation having the other members on the discussions (i.e. yourself and two other institutions on the panel)
- The Blackwell Inn, excellent meals, friendly people. Sharing between the different Big 10 Schools. Program Information
- Time to share with others. Visit to President's home. Dinner on Sat. night very nice.
- Dinner at President's home. All discussion groups.
- Meeting everyone. Talking about so many different programs and functions of our organizations.
- All the constructive programming ideas. In general, I liked how constructive the topics and discussion were. Also, Social media discussion set me thinking. That's the goal, right?
- Informality of the discussions which encouraged wide participation; all the sessions were informative .
- The facility and organization of the conference. The meals were great and of course, the participants were fun!
- The programming –very relevant with lots of take-away ideas.
- The Saturday a.m. breakfast session.
- Sharing of Best Practices.
- The four theme sessions- good and varied formats. The Friday and Saturday night dinner events were especially enjoyable.
- The division into four parts held interest and allowed for great interaction. The Auditorium seating/venue was especially conducive to this.
- The organization, the degree of hospitality. All around, a wonderful conference. Well done!

I WISH WE HAD:

- Spent a bit more time discussing verifying ideas or purposes and goals of the different Associations and how the association can adapt to the culture of the Baby Boomers who are now retiring.
- More Food (Ha!)
- A.M. worked well
- Perhaps a session on anticipated changes (e.g. technology, health-medical insurance, higher educate budgeting, etc) and their impact on retirees.
- It seemed well timed, friendly, and supportive.
- Better AC on bus on Friday. A few more breaks on Saturday. It was a very intense, busy day.
- There was a little too much redundancy in information shared.
- More time to discuss issues facing us for Retiree Benefits.
- More information about Purdue Association health and benefit program. More group discussion of topics vs panel presentation—just a moderation of topics to discuss in the group. Other ways to serve members beside newsletters and social media.

FUTURE CONFERENCES SHOULD INCLUDE:

REENERGIZING YOUR ASSOCIATION – 12

NETWORKING BIG 10 ASSOCIATIONS - 11

HIGHLIGHTING THE HOST CAMPUS - 8

Note- This is always nice and a plus for attendees, but it doesn't benefit our home association (which pays for our trip) in the same way.

OTHER-

- How do you determine the needs and interests of your retirees? Do you have any programs for those who deal with end-of-life issues? What services might your association utilize that compete with your University? (i.e.-printing, mailing) Do you ever get bids or cost comparisons.
- Providing information for individual retirees.
- Marie as permanent chair.

- We should have a full session on retiree benefit at each Big 10 University
- Retiree Conference including Health and Pension Benefits.
- Legislative challenge/
- Pension problems/possible solutions.
- Any new ideas on effective recruitment and contact with members and non-members.

TOPICS TO CONSIDER AT NEXT CONFERENCE:

- Use all of the above for conference content
- Above
- Adapting programming to address wants/needs/culture of those born after 1950.
- Lots of sharing! I loved this year. Purdue health insurance- Big 10 Health Insurance
- Enhancing volunteer labor among your membership-to/for your association as well as to university and community activities.
- More on social media. More on acquiring University support.
- Pension reforms nationally as well as locally-benefits.
- How the 2012 elections and legislative actions effect our retirees' health plans.
- Reaching our "younger" retirees-also clerical and service retirees benefits
- Can't help here! Thanks, it was great.
- Benefits for retirees in a changing environment
- Retirees Affiliation/Liaisons with key University Units.(e.g. Alumni Office, Development Office, Foundations, Human Relations, Human Resources, Communications with potential retirees.
 - What is most important topics for retirees? Pension info, health info. Etc.
 - Use of Volunteers (retirees) or paid personnel to accomplish association projects. Cooperation between associations on possible Tours and Travel (National and International) What is appropriate number of newsletters/year ? More use of Email and Enotice. What content used on Facebook? How do you keep computer info relative vs newsletters? Are newsletters becoming obsolete? When do you kick someone out of Facebook? When do you admit? List topics for discussion in advance and ask to attend prepared to share data, results, and ideas.

List of Participants:

Association of Retirement Organizations in Higher Education: Meyer, John

Indiana University: Schelhammer, Jim and Eileen

Michigan State University: Hull, Jerry and Suzanne; Smith, Ron

Ohio State University:

Bondurant, Michelle
Firebaugh, Francille and John
Gauthier, Howard and Virginia
Goerler, Raimund and Sharon
Gordon, Virginia
Green, David and Christie
Hamilton, Carlene
Harsch, Wallis and Patrick
Herbst, Mary Anne
Hill, Richard and Lee
Hobbs, Michelle
Lantz, Diana
LaPidus, Anne
Maklin, Marty
McCutcheon, Kathleen and Paul
Morgan, Sally
Mount, John
Ridenour, Tom and Fran
Selby, Diane
Studer, William
Sweeney, Tom and Bev
Taris, Marie and Ed
Warmbrod, Cathy and Bob

Pennsylvania State: Rung, Don and Katie

Purdue University: Gentry, Don; Hiser, Sue

University of Illinois: Conroy, Sharon and Tom

University of Iowa: Starck, Kenneth; Williams, Nancy

University of Michigan: Beutler, Fred and Sue; Butler, Pat and Don

University of Nebraska: Goebel, Jack; Seagren, Alan

University of Wisconsin: Craig, Judy