

Summary of the Big Ten Retirees Association Meeting, August 9-11, 2013 University of Michigan, Ann Arbor, MI

The Big Ten Retirees Association Meeting, August 9-11, 2013 was hosted by the University of Michigan Retirees Association (UMRA) at the Michigan League. Planning for the event occurred over the past two years and funding was from the UMRA, the Office of the President and Walbridge, Inc. The theme for the meetings was "Fostering a Healthy and Purposeful Retirement for Yourself and Your University Retiree Association Members".

The meeting was attended by 19 representatives. Northwestern attended for the first time and University of Wisconsin did not send representatives. Four of the representatives were accompanied by spouses.

Friday night there was a reception in the Garden of the Michigan League with dinner following in the Hussey Room. Rebecca Dunkle, Associate University Librarian for Library Operations welcomed the group to the University of Michigan and gave a presentation about our changing libraries. Saturday afternoon there was a bus tour of the campus with Fred Meyer leading the tour. Dinner was at the Lurie Engineering Bldg in the Johnson Room with entertainment by Bill Meyer. The majority of the weekend was spent in meetings.

Saturday morning the program was begun with Dr. V. Strecher, PhD, MPH, Professor and Director for Innovation and Social Entrepreneurship, U of M., presenting New Lessons in Health and Wellbeing in Retirement. Dr. Strecher had been working with our committee for the past year to prepare the program. There was a lot of dialogue with representatives throughout his presentation. This presentation was videotaped and is now on YouTube under the title: Vic Strecher - On Purpose: New Lessons in Health and Wellbeing in Retirement. This video can be viewed by anyone and will be marketed to retirees and hopefully to pre-retirees at the University of Michigan and the other Big Ten Universities. DVD's of the presentation were also made and will be mailed to each University including U of Wisconsin. The UMRA members will view the DVD on Oct, 10 at our Annual meeting. Representatives also completed a questionnaire about their values, their purpose/s in life/retirement and a S.P.A.C.E questionnaire. Dr. Strecher was followed by Dr. V. Katch, MS, EdD, Professor of Kinesology and Assoc. Prof. of Pediatrics, U of M, discussing Happiness. There was also discussion after this presentation and the relationship of happiness to health and purpose.

Following these presentations, a representative from each University spoke.

Representatives had been sent seven questions related to purpose and health and how their Association and/or University dealt with this for pre-retirement employees and for the retirees. These questions were answered, returned and reproduced so all representatives had copies of the information. A representative from each University then spoke to the questions, added detail, talked more about their Retiree Association (RA) and answered questions.

The seven questions were:

- A. Does your Retiree Association (RA) have a mission statement that promotes maintaining a healthy and purposeful life for the members?

University	Response
Indiana U.	No. We sponsor a wide variety of educational programs and social events

Illinois	<p>B. Well, sort of. Our chapter Bylaws have a section titled "Purpose". Section 1 therein says: <i>The primary purpose of this organization shall be to protect, promote, and enhance the individual and collective interests and welfare of its members.</i></p> <p>This has been viewed primarily in the financial and political context, and not general health or lifestyle.</p>
Michigan	<p>We have no Mission Statement however our UMRA Constitution states: The Association is intended to meet the needs of retirees who are generally senior citizens and hence face problems typical of old age, further, to educate them as to Univ. policies and governmental regulations which affect their health care and economic security, and further, to provide social occasions at which they can gather and to arrange cultural events of benefit to them.</p>
Iowa	<p><i>The University of Iowa has two retiree groups: the UI Retirees Association (UIRA) and the Emeritus Faculty Council (EFC). Many retirees belong to both groups.</i></p> <p><i>From the UIRA bylaws: The purpose . . . is to facilitate support of the University of Iowa by retired faculty and staff members and to promote the interests and welfare of those retirees.</i></p> <p><i>From the EFC bylaws: The goals . . . are to provide advice and assistance to its current and prospective members on matters of mutual concern, and to the University in carrying out its various missions.</i></p>
Minnesota	<p>The mission of this association shall be to promote, protect, support and advocate for the interests, rights, needs and welfare of persons who retire from the University of Minnesota. More specifically, UMRA Goals are:</p> <ul style="list-style-type: none"> • To help retirees successfully deal with the retirement process, both during their retirement year and into their retirement years. • To provide all retirees broad intellectual stimulation as well as social and recreational services; • To oversee and assist in the ongoing provision of benefits affecting the health and wellness of retirees; • To facilitate opportunities for voluntary service to the University and community; • To contribute to the development and welfare of the University and its mission and goals.
MSU	<p>Rosemary is sending the mission statement. I believe it promotes maintaining a healthy and purposeful life for the members</p>
Nebraska	<p>We do not have a mission statement that specifically addresses as one of the goals of the Nebraska Retiree's Association (NRA) the promotion of a healthy and purposeful life, but a statement of objectives does mention as one of the association's objectives "to provide an opportunity for the presentation and discussion of topics of interest to members of the association." Topics</p>

	related to a healthy and purposeful life, more healthy than purposeful I would say, have been featured from time to time at monthly luncheons and have been the topic at more informal meetings of a subset of members from time to time.
Northwestern	No
Ohio State	The by-laws of the OSU Retirees Association state that our purpose includes “ways of maintaining and improving he member’s health condition” and “ways of maintaining and improving the member’s economic status and financial condition.” See attached
Penn State	No According to our Constitution our purpose is "to promote fellowship, further advance the general welfare of the membership and advance matters of mutual interest to programs of the Pennsylvania State University". We represent retired faculty and staff -and their spouses or partners-of the University.
Purdue	PURA does not have a mission statement

B. What programs or activities does your RA have annually/regularly that are directed at maintaining health and/or having a purposeful life?

University	Response
Indiana U	None
Illinois	C. Not a lot, actually. We have two general membership meetings a year, which are dedicated to answering concerns about the political quagmire in Springfield; i.e. in what new ways they are trying to reduce our pensions, and what our organization is doing to prevent it.
Iowa	Except for summer months, UIRA members meet monthly to learn about varied topics (past year examples: Higgs boson (the “God” particle); work of the Iowa Flood Center; health insurance update; “alien worlds” revealed by astronomers—see UIRA website “Photo Gallery” and “Programs & Events” for more). For the coming year plans are underway for one or several meetings focused on health. UIRA also has an annual meeting to recognize contributions and elect officers. Except for summer months, the EFC, which is an elected 15-member board representing the Emeritus Faculty Association (EFA) , meets monthly usually featuring university-related programs (past year examples: interdisciplinary research opportunities for emeritus faculty; trends in the preparation of teachers; health care benefits; university policies regarding retirees). UI President Sally Mason spoke at the group's annual meeting. Both the UIRA and EFA work with the UI Alumni Association in sponsoring the UI's Senior College for all retirees. Often sessions deal with health issues (e.g., hearing loss, economics and ethics in sustainable food). To provide full context to promoting a healthy and purposeful life to retirees, other agencies' programs have to be taken into account. In Iowa City these include activities of the Johnson County Senior Center and the University Center on Aging's Lifetime Enrichment Adult Program (LEAP), both of which offer extensive programming dealing with health.
Michigan	Annual Health Day, speakers at our social gatherings, and articles in our Newsletters

Minnesota	<p>Periodic workshops--several per year--following monthly luncheon meetings.</p> <p>The program committee plans and schedules events and speakers. Each of the monthly meetings: September, October, and November plus January through May, features a speaker or other presentation at the luncheon meeting. The program committee welcomes suggestions – and feedback – by phone or email to any of its members. In addition to monthly meetings, the program committee may schedule other events of special interest to UMRA members</p>
MSU	<p>We have a health committee, which is perhaps our biggest committee and it meets regularly throughout the year. Numerous speakers have spoken on topics of health, and health concerns, such as Alzheimer's and its effects on caregivers, resources available, etc. Speaker programs and campus tours encourage members to learn about areas of the University they were not previously aware or knowledgeable about and to get out and try something new.</p>
Nebraska	<p>None on a regular basis, but from time to time as noted above.</p>
Northwestern	<p>Bimonthly luncheons plus three dinner meetings with speakers</p>
Ohio State	<p>Annually, our fall conference has sessions related to health and to topics pertaining to a purposeful life. In addition, our monthly luncheon and dinner events will from time to time have speakers about those topics. In fact, all the activities of OSURA such as the Embracing Retirement fall conference, tax and estate planning workshops, local and foreign travel, cultural events, and SIGs that add to maintaining a healthy and purposeful life. Currently, we are working with a newly established office, the Office of Volunteer Relations, to participate in a program of encouraging university retirees to volunteer for the campus.</p>
Penn State	<p>? We have an annual fall public meeting to discuss in detail the next year's Health Care program</p>
Purdue	<p>D. PURA: we have a variety of programs. There is a "Purposeful Living in Retirement" Committee which presents a day-long program, normally every other year; over 300 retirees attended this April. In addition various other programs are presented on an ad-hoc basis thru the year. For example, a fitness workshop will be held on August 8. See our website at http://www.purdue.edu/retirees/index.html for details.</p>

C. Does your University have any programs/ materials for individual's pre-retirement that will assist them to move into a healthy and purposeful retirement? This would be other than financial advice and benefits and insurance.

University	Response
Indiana	No
Illinois	. None that I am aware of
Iowa	The UI Preparing for Retirement Sessions are offered twice a year. Preparing for Retirement checklists and resources are available on the University Benefits Office website, and a monthly Financial Education series is offered. http://www.uiowa.edu/hr/benefits/educate/finance_educ_classes.html . The site has several modules, including one titled "Making Wise Healthcare

	Preparations.”
Michigan	The Faculty and Staff Assistance Office offers workshops-“Successful Retirement: What Does It Take Besides Money?” There are sections on nutrition, activity/exercise as well as on the psychological/social aspects of retirement. There is, however, some question regarding their availability. Only one or two have been held with about 100 participants. Over 700 people retired this past year.
Minnesota	The University’s HR department offers a workshop late each spring for those U employees about to retire. UMRA has a small time slot in that program to describe UMRA and its programs, and to invite membership. After that single contact by UMRA at the HR workshop, further cooperation between University HR and UMRA has been impossible because UMRA is an independents 501-C(3) organization and University HR rules prohibit HR helping UMRA keeping in touch with U of M retirees. This is a problem that we are working at trying to resolve.
MSU	The University offers a program entitled, A Road Next Traveled, which is scheduled numerous times throughout each year. It covers many such topics. Our Association frequently provides speakers for the presentations and commonly does pane
Nebraska	No
Northwestern	No
Ohio State	The Ohio State University does have publications about healthy retirement and from time to time offers events centered around that theme. See http://hr.osu.edu/osura/resources.aspx . OSURA was an active participant in these publications. However, almost all attention concerns the retirement process and the legal and financial concerns.
Penn State	No
Purdue	PURA. Other than general healthy living and fitness advice and programs, not specifically for retirement planning. The University did recently complete a \$100 million expansion of the fitness/recreation center. See http://www.purdue.edu/recsports/about_us/rsc_renovation/

D. Does your University have pre-retirement programs or materials for potential retirees that covers developing a purposeful life in retirement i.e., programs that focus on healthy lifestyle, such as adequate sleep, creativity, good eating, mental health and awareness?

University	Response
Indiana	No
Illinois	None that I am aware of
Iowa	Through the Live Well program, wellness, fitness programs and health coach services are offered including a focus in the areas of smoking cessation, stress reduction, sleep, weight control and healthy eating. University Human Resources offers Elder Care Services through Family Services <i>and an Employee Assistance Program through Organizational Effectiveness.</i>

Michigan	Yes as provided in the FASAP program.
Minnesota	Not at present, although UMRA does this and is trying to work out a partnership with University HR in order to continue doing exactly that.
MSU	Yes, see above response
Nebraska	No
Northwestern	No
Ohio State	The Retirement Handbook does have pages pertaining to staying connected with OSU, the importance of social ties, and the opportunities and activities of the OSU Retirees Association. However, the handbook does not refer to adequate sleep, creativity, good eating, mental health and awareness. Most of the attention in the publications focus on benefits, financial and legal concerns, and housing
Penn State	No
Purdue	PURA: Not particularly

E. Does your RA participate in any of your employee pre-retirement programs either by providing input on preretirement programs, giving presentations, or meeting with employees?

University	Response
Indiana	No, but a good idea that we will pursue
Illinois	Yes. Our RA co-hosts the pre-retirement workshop offered annually by the University. (That workshop deals with pensions, insurance, and financial issues, not health and lifestyle topics.)
Iowa	Yes. UIRA is able to make a brief presentation to retirees
Michigan	Yes, on occasion
Minnesota	UMRA has the single opportunity as described above, but no additional opportunities.
MSU	Yes, see response to C above
Nebraska	No
Northwestern	Yes. Annual seminar for those nearing retirement on choosing best health insurance options.
Ohio State	At present, our activities in this area are more limited than we like. Typically, we are present at university banquets that honor recent retirees and those who have achieved awards for years of service, e.g. 25 th , 30 th , etc. On campus, representatives of Ohio's State Teachers Retirement System and the Ohio Public Employees Retirement System do give presentations, but these tend to be poorly attended. Most prospective retirees attend retirement presentations given by these organizations at their headquarters in downtown Columbus rather than on campus.
Penn State	We have a limited opportunity to hand out applications for our Club to about-to-be-retirees.
Purdue	Yes, we are involved in pre-retirement seminars

F. Does your RA support the idea that it should help to foster a purposeful and healthy life for its members?

University	Response
Indiana	Has not been discussed

Illinois	C. ? Hasn't really been discussed in any significant way. We are fully occupied trying to save our pensions and benefits in an [unofficially] bankrupt state.
Iowa	Yes, though most efforts to date have dealt with current issues, that is, developments around the University and community (e.g., flooding, research, proposed public projects, etc.). The emphasis has been on helping members lead a purposeful life with somewhat less attention devoted to health issues.
Michigan	Yes. And members of our Board have served on the MHealthy committee
Minnesota	Absolutely. This has been a continuing emphasis by UMRA, and during the past year our past president Ron Anderson has made this his primary emphasis.
MSU	Yes
Nebraska	I suspect it does, but we have not thought much about it and have no programs beyond what is noted above.
Northwestern	No
Ohio State	Absolutely!
Penn State	Not Directly
Purdue	Absolutely

G. Does your RA have a mentoring program?

University	Response
Indiana	Has not been discussed
Illinois	Don't understand who, or for what intention, we would be mentoring people. As future officers of our RA? ... Board members? ... fellow retirees?
Iowa	The UIRA does not have a mentoring program. EFC encourages members to establish relationships with their former academic units, and some members do engage in mentoring junior faculty.
Michigan	No
Minnesota	Only through the University of Minnesota Volunteer Center (UMVC), an independent activity that spun off of UMRA some years ago and is now supported by the University. Volunteers to the UMVC come from UMRA and other sources, and some of the activities of UMVC involve mentoring. During the coming year we will be advancing an initiative to use UMRA members in mentoring of persons within the University.
MSU	Not formally
Nebraska	? I assume you refer to mentoring that aids the transition to retirement? The answer is no
Northwestern	No
Ohio State	Not at present but we would like to explore.
Penn State	No
Purdue	No

Discussion centered around what different RA's were doing in relation to retirees health, fitness and some on purpose in life. PURA (Purdue) seemed to have more activity related to pre-retirees and they had (now being revised) a video on retirement, other than financial or benefits, that included purpose in life on their Association website.

After a tour of the campus and dinner Saturday night, the meetings resumed Sunday morning with a dialogue with Dr. V. Strecher, Going Home with Purpose Among Your Retirees. The dialogue was enhanced by the use of the previously completed questionnaires as a starting point.

The Business meeting began at approximately 10 am. The Bylaws were covered with a discussion of inviting Rutgers and Maryland to the 2014 meeting. Discussion of CIC or Big 10 with the conclusion that a small group will look into wording changes to the Bylaws to focus on the CIC but utilize the name recognition of Big Ten. This will result in the inclusion of the University of Chicago in all probability.

The University of Michigan will continue to be the website for the Big 10. Nancy Firestone will keep the website updated and plans were made to keep the contacts and develop links to all the Big Ten Newsletters.

Discussion occurred about retirees and financial difficulties and the changes in finances that are affecting them. With this in mind, Rai Groeler, OSURA, will begin a ListServe so members of this group can blog with each other.

Meeting was adjourned at 12:00. The Duck mascot was passed to John Adams of Minnesota.

Respectfully submitted:

Patricia M. Butler, Chairperson, 2013 Big Ten Retirees Association Conference
Vice-President, University of Michigan Retirees Association