



BOARD OF DIRECTORS MEETING MINUTES

September 14, 2016

MEMBERS PRESENT: Marty Townsend, Leslie Palmer, Rose Porter, Mary Anne McCollum, Libby Miederhoff, Tom Henderson, Gary Smith, Larry Windmoeller, Rich Anderson, Linda Cook, Kee Groshong, Barb Harris, Debbie Robison and Phil Shocklee.

The meeting was called to order on behalf of Kitty Dickerson by President-Elect, Marty Townsend at 2:06 p.m.

MINUTES: The minutes of the MURA meeting held on July 20, 2016—Motion to approve by Barb Harris, seconded by Gary Smith.

PRESIDENT'S REPORT:

Marty Townsend gave an update on the health concerns that have evolved for Kitty Dickerson during a family visit in NYC. Kitty was able to get an appointment at Sloan-Kettering for a second opinion, and may have surgery in NYC before coming home to Columbia for continued treatment. Bill Fisch reports that Kitty is resigned to the need for treatment but also that they are confident in the care being provided. We do not expect Kitty to be able to come back as President this year.

Marty, Gary Smith and Kee Groshong have discussed the steps to be taken in this situation according to the MU Retirees Association Constitution and Bylaws. (Tom Henderson was unable to attend their meeting.) With the affirmation of the Board, Marty Townsend President-Elect will become the Acting President. Two immediate priorities: It is Kitty Dickerson's wish to continue to build the MURA Scholarship Endowment Fund and someone will need to be identified to Chair the Program Committee.

According to the MURA Constitution, Article V—Officers and Board of Directors, Section 5, the President shall appoint chairs of all committees, with the exception of Finance, Program, and Past Presidents Committees, subject to the approval of the Board, no later than at its next meeting. Marty Townsend as Acting President cannot appoint the next Program Chair.

Marty called for suggestions of whom to ask to assume the position of Program Chair and subsequently President-Elect. Several names were put forward and considered. Tom Henderson, as Chair of the Nominating Committee, will ascertain individuals' interests and confer with other members of the Nominating Committee which is made up of the Acting President (Marty Townsend) and the two other most immediate Past Presidents (Jim Koller and Ken Hutchinson) and Kitty Dickerson, if she is able to be involved. The Nominating Committee, in addition to nominating a Program Committee Chair/President-Elect, will also be nominating a Secretary for a two-year term, a Staff-at-Large Representative and a Faculty-at-Large Representative for 2018-2020.

Gary Smith and Kee Groshong agree to keep leading us forward with Kitty's signature issue, the MURA Scholarship Fund. Marty will also champion that initiative at every opportunity.

Marty Townsend extends her sincere thanks for the help she has received in this transition from President-Elect to Acting President. Everyone has been generous with help. Marty will have many more questions as the year goes on and will be calling on members of the MURA Board for advice. Marty welcomes emails and phone calls to remind her of anything she needs to know, has overlooked, or misunderstood.

TREASURER'S REPORT: Debbie Robison (see reports for Cash Flows 7/1/10 through 9/14/16)

So far there have been few financial transactions in the new fiscal year that began on July 1, 2016. There have been four transactions this year and the only fairly large expense has been the AROHE (Association of Retirement Organizations in Higher Education) Conference in Seattle, WA for President-Elect Marty Townsend. Additional expenses included the domain name and registration for the State of Missouri. A few membership dues have come in but not much to report in this short period of time. Debbie posed the question of the need for a budget for this year. Tom Henderson clarified that the budget is not required. Tom's reasons for developing a budget: (1) Tom was asking for joint reimbursement from System and Campus regarding the printing and distribution of the MURA Newsletter (quarterly). (2) A miscellaneous budget category had been established in the amount of approximately \$500 in order for Tom to be able to access the miscellaneous funds without having to come to the Board for appropriations. Also, Debbie suggests somewhere adding a footnote regarding the scholarship fund. Gena Scott, Development Office, is the contact person regarding the scholarship fund. It was pointed out that the reporting of the scholarship fund is actually held by the University but MURA still has an interest in fundraising for the fund and it would be helpful to know the balance of the fund. The attached MURA Statement of Cash Flows 7/1/16 through 9/14/16 was accepted.

AUDIT OF MURA FINANCIAL RECORDS: Libby Miderhoff

The Audit Committee will be doing an audit of the MURA financial records next week. This is an audit of the Treasurer's books.

MURA SCHOLARSHIP REPORT: Gary Smith and Kee Groshong

Gary Smith and Kee Groshong were appointed by Kitty Dickerson to be the lead people on the scholarship fund development effort. Marty Townsend reported that Kitty wanted this effort to be the hallmark of her year as MURA President.

- MURA Scholarship Fund announcements and donation procedures to make contributions as the year goes on were distributed on the tables at the Tuesday, September 13, MURA Breakfast Meeting.
- The MU Bookstore Greeter effort netted about \$400 and this will become an on-going arrangement before the opening of each semester. Jeff Zeilenga has given calendar dates and issued a contract. This is an opportunity to generate additional scholarship funds.
- Kitty wanted a big event this Fall to kick off the scholarship fund drive such as reserving the Columns Club in the stadium on the East side and asking for donations per person. However, without Kitty here to be the driving force, this event will occur on a smaller scale. Fall is a hard time to do events at the football Stadium; Spring is probably easier to schedule and would allow more time for planning. A no-host reception at a local hotel with finger food is being considered maybe in lieu of the Fall social.
- Volunteers are invited to participate in the process and the leaders are wide-open to suggestions. Brainstorming is welcomed and help is needed for all activities and/or events.

- Debbie Robison suggested contacting a local restaurant such as Shakespeare's, Panera's, Culver's, etc. to coordinate a fundraiser night.
- Kee Groshong noted that there is a list of businesses that allow you to sell coupons or cards at a discount. Organizations that sell get the differential which amounts to anywhere from 2% to 5% per sale.
- Another suggestion is to send a personalized email about the scholarship program to the MURA Listserv group.
- Marty Townsend will let Kitty Dickerson know that efforts continue albeit at a somewhat slower pace.

STANDING COMMITTEE REPORTS

MEMBERSHIP: Marty Townsend for Dick Otto

Dick was unable to attend the meeting, but reports little activity with new members and renewals. Annual renewals generally occur in the first few months of the calendar year. In the interim, it is up to the rest of the Board members to recruit new members. Please encourage anyone you know to join the group. Discussion ensued about the UM System sponsoring four to six orientation sessions for retirees each year. Gary Smith and Kee Groshong have on occasion served as panelists at these sessions where MURA membership information is provided. It is believed that Dick Otto on occasion is available at the orientation sessions to provide MURA information in an effort to recruit new members. UM System Human Resources controls the email distribution list of employees who are retiring and has occasionally forwarded MURA membership information on our behalf. Dick Otto and Barb Harris have attempted to get MURA information inserts included in the orientation packets for new retirees; however, the constant turnover within the UM System Human Resources Department has made it difficult to coordinate a systematic process of recruiting MURA members. Membership forms will be made available at the MURA Fall Information meeting to be held on October 1 at Reynolds Alumni Center.

PROGRAM COMMITTEE: Marty Townsend

- The Fall social, which was to have been held at the Chancellor's Residence as a fundraiser for the Scholarship Fund, was cancelled for three reasons: the event had inadvertently been scheduled on Yom Kippur; Donna Puleo informed us that fundraising events are not permitted at the Residence; and there wasn't sufficient time to secure another venue on another date. The Chancellor, however, remains supportive of MURA and will continue to call informally on the MURA Board to inform his decision making due to members' institutional memory.
- The MURA Fall Information Meeting will be held on Saturday, October 1, 10:00 a.m.-12:00 noon, Reynolds Alumni Center. UM Senior Director of Benefits and Retirement Wendy Wiederhold will report on the new retiree medical benefits plan, and Provost Garnet Stokes will give an overview of MU administrators holding interim status and her plans for hiring permanent replacements.
- The list of donors to the MURA Scholarship Fund is ready; Barb Harris offered to write, address, and mail thank you notes. Board members suggested they could forgo receiving handwritten notes.
- John Parker had signaled his intent to retire as Education/Entertainment Committee Chair as of Fall 2016 but has now announced that he will remain in that role through May 2017. In support of the effort to increase the MURA Scholarship Endowment Fund, he is discussing the possibility of a joint event with the School of Music. Other events and other venues, such as the Country

Club of Missouri and the Old Faculty Club, are also being considered. At all events, the Scholarship Endowment Fund will be presented and attendees will be asked to make contributions or commitments to support the fund's growth.

PUBLIC POLICY COMMITTEE REPORT: Mary Anne McCollum

- The State Legislative Candidate Forum will be held on Tuesday, October 4, 2016, at the Country Club of Missouri. A breakfast buffet will be served at 8:00 a.m. and the Forum will be held from 8:30 to 9:30 a.m. Candidates invited to participate include: State Senate: District 19 and House of Representatives: Districts 44, 45, 46 and 47. There is a \$10 charge for the breakfast buffet. To make a reservation, please call Jack Miles at (573) 445-5024 or via email at milesjw@missouri.edu.
- We are drafting questions to make the Forum more structured. If anyone has any questions not only regarding higher education but perhaps anything that affects retirees, be sure to forward them to Mary Anne.
- The legislative session begins January 4. January 9 might be an appropriate date if we want to do something with our local delegation.
- Revenues for the State of Missouri are coming in miserably; probably money will not be released for capital improvements such as the Conservatory, Historical Society, etc.
- The date for the MURA Legislative Day at the Capitol in Jefferson City is February 28, 2017.
- The Flagship Council can lobby but the Campus cannot.

COMMUNICATIONS COMMITTEE: Barbara Harris

- The July newsletter has been delayed due to extenuating circumstances with Ginny Booker who is in charge of doing the layout for the newsletter. It is now September and the July newsletter is still not out. Ginny Booker sends her regrets. Ginny has also requested that she be relieved of these duties as she doesn't feel she is fulfilling her role as she would like. Various names were discussed at the meeting as to whom would be a good replacement for Ginny Booker.
- Those retirees who only receive the print version of the newsletter (75-80% of the members) through the U.S. mail will not receive the information about the October 1st MURA Fall Information Meeting for approximately another two and one-half weeks. It was agreed that Barb would send an email to the MURA Listserv Group as soon as possible. In addition, Barb will contact Melanie Barger at the UM System office to ask if she could and would send out information about the MURA Fall Information Meeting using the HR System distribution list which contains all retirees and not just MURA members. It is believed that because a retiree insurance update will be presented at the Fall Information Meeting, the System Office would be interested in providing this service on behalf of MURA.
- An insert on the MURA Scholarship is expected to accompany the MURA newsletter when it is mailed by Printing Services.
- There has been no newsletter published since February of 2016. It was suggested that since the July newsletter print version is likely to reach the homes of retirees in two and one-half weeks that a shorter version of the Fall newsletter (possibly) four pages be published including information regarding the Holiday Luncheon in the near future. A November 15 publication date for a mini-newsletter would be ideal. Usually the whole front page of this newsletter is the President's with a photo.

- It was suggested that someone needs to again approach Melanie Barger and Brian Milner asking for joint reimbursement from System and Campus regarding the printing and distribution of the MURA Newsletter (quarterly). Someone needs to follow up on this as it amounted to a \$1900 savings to MURA last year.

EX-OFFICIO, AD HOC, AND OTHER SPECIAL COMMITTEE REPORTS

UNIVERSITY LIAISON-ADMINISTRATION: Linda Cook

- MURA Board members who met with the Chancellor over the summer were invited to be the Chancellor's guest at the September 24 MU football game. Linda reminded those included in this invitation to be sure and RSVP to Janet Waibel in the Chancellor's office as soon as possible. Linda will check to see where the group will be seated.
- The Fall meeting of the University Retirees Association Four-Campus Leadership Team will be held on Thursday, October 27, 2016 from 10:00 a.m. to 1:30 p.m. in the President's Conference Room, 321 University Hall, on the Mizzou Campus. An update report from our own campus is needed. Board members from the other campuses also will prepare and provide an update on their activities and accomplishments. Linda will be asking for agenda items to be discussed at the meeting. Marty might want to bring up AROHE and the MURA newsletter is usually distributed. The four campus leaders will spend the first hour updating each other on their respective campus activities. Michael Middleton, Interim President, will join the group at 11 a.m. to make a presentation and have dialogue. Plans are that he will bring a member(s) of his staff and stay through lunch.
- MURA Board members typically meet with the Chancellor twice a year (Fall and Spring); the most recent meeting occurred on Tuesday, August 23, 2016 at the Chancellor's Residence. A Fall meeting with Interim Chancellor Foley will be coordinated by Linda Cook as a follow up to the previous meeting and to continue discussions on how retirees can make a contribution and provide assistance. Linda, Marty and Tom will work on an agenda and talking points for a meeting to be scheduled in November. It will be suggested to the Chancellor that it might be good to invite the new Campus Vice Chancellor for Human Resources.

PAST PRESIDENTS: Gary Smith

- Past Presidents will meet tomorrow, Thursday, September 15, at 10:00 a.m.

STAFF COUNCIL: Phil Shocklee

- The plaques for retiree awards that were hanging in Jesse Hall were taken down at the time of redecorating need to be located. The plaque has not been updated since 2007 and is also filling up; a new plaque may need to be purchased.
- Kee Groshong mentioned that in addition the past-president's plaque is also missing.
- When the MURA outstanding awards and past-president's plaques are found, they will be placed inside the auditorium.

OSHER INSTITUTE: Marty Townsend for Bill Fisch

- Bill Fisch is on his way to New York City; no report at this time.

UNIVERSITY RETIREE BENEFITS: Rose Porter (see reports)

- Bob Stewart is no longer on the system-wide committee; Rose Porter replaces Bob Stewart. The University Health Benefits Committee appointed by Jim Koller is no longer in place. Bob Churchill and Rose Porter served as Co-Chairs for that committee. This group will no longer meet as the Health Benefits task has been completed. Bob Churchill will continue to serve as Faculty-at-Large member of MURA.
- United Health Care has been selected as the insurer for the University health plans offered to retirees who are enrolled in both Medicare A&B. This is a little different from an individual Medicare Advantage Plan in that this is an employer sponsored Advantage Plan.
- An update to the MURA Retiree Association Leadership regarding the 2017 Retiree Medical Plans and timeline is provided as an attachment to these minutes. According to the timeline, communication to retirees introducing vendor and providing timeline of expected communications is to occur now, September 2016. Educational opportunities (in person, online and conference call) will be provided in October 2016.
- We will stay on our same drug plan; it is highly advisable to obtain supplemental travel insurance when traveling outside the country.

OTHER BUSINESS

UNITED WAY: Tom Henderson

Tom Henderson agreed to serve as the liaison for United Way. The kick off was held at the MU Student Center on September 13, 2016, with remarks at 11:00 a.m. The campaign is off and running and the group met this morning. Kitty Dickerson had signed the United Way letter; it is believed that the letter is out via first-class mail. The letter outlines how individuals can help as well as the process and procedures for making donations. Retirees donated approximately \$79,000 last year which represented 110% of its goal. Retirees were the only group of the six or seven groups represented to meet its campus goal. We will be kept posted on what is going on with the United Way.

AROHE CONFERENCE REPORT: Marty Townsend (see reports)

Townsend attended the 2016 AROHE (Association of Retirement Organizations in Higher Education) Conference in Seattle, Washington, August 14 through 16. One interesting observation is that some universities employ a “universal membership” approach, in which faculty and staff automatically become members of the retiree organization upon retirement, eliminating the need to collect dues, update lists, etc. With this “universal membership” approach, the universities typically fund the organization. See Townsend’s attached report for information on other aspects of the conference. Henderson and others recommended that Townsend share some of the report’s information with the Chancellor and new HR director when possible.

Meeting adjourned 4:06 PM.

Next meeting of the Board is Wednesday, January 18, 2017, at 2:00 PM.

Respectfully submitted,

Leslie J. Palmer, MURA Secretary

**MU Retirees Association
Statement of Cash Flows**

	<u>Actual Year to Date As of Sept 14, 2016</u>	<u>Actual Year Ended June 30, 2016</u>
Operating Activities Supported by Member Dues and Investment Income:		
Receipts		
Dues-annual	\$ 7.50	\$ 1,177.50
Dues-lifetime	225.00	3,900.00
Investment income		2,512.99
Total Operating Receipts	\$ 232.50	\$ 7,590.49
Disbursements		
Newsletter-publishing/printing		1,283.92
Newsletter-postage/delivery		582.25
UM and MU Newsletter Reimbursement		(1,866.17)
Business meeting		770.54
Fall information meeting		1,235.89
MURA Internet Office	59.40	93.40
Attend Biennial AROHE Conference	1,731.54	-
AROHE dues		120.00
Flagship Council		100.00
Filing fee State of Missouri	30.00	15.00
Membership materials		235.00
Post office box rent and postage		67.60
Miscellaneous	6.00	615.47
Total Operating Disbursements	1,826.94	3,252.90
Excess of Operating Receipts over Disbursements	(1,594.44)	4,337.59
Self-Supporting Social Activities:		
Holiday Luncheon		
Receipts		3,000.00
Disbursements		4,392.90
Net Receipts (Disbursements)		(1,392.90)
Spring Picnic		
Receipts		1,106.00
Disbursements		900.85
Net Receipts (Disbursements)		205.15
25th Anniversary Activities:		
Museum event registration fees		\$1,026.00
Contributions		300.00
Disbursements		(1,413.45)
		-\$87.45
Other Receipts (Disbursements)		
Transfer from checking to investment account		
Net Increase (Decrease) in Cash During Period	(1,594.44)	3,062.39
Cash Balance, Beginning of Period	9,154.35	6,091.96
Cash Balance, End of Period	\$ 7,559.91	\$ 9,154.35
Investment Assets (See note 1)		Jun. 30, 2016
Lifetime Members Reserve Investment Account		\$ 85,391.39

Notes:

(1) This asset pool was established from lifetime membership dues. The income from these investments provides continuing services for lifetime members as they no longer pay membership dues. Currently, these assets are invested in the Vanguard Wellesley Income Fund.

September Update to Retiree Association Leadership: 2017 Medical Plans from Donna Scoggins on behalf of Wendy D. Wiederhold, Friday, September 2, 2016

Retiree Association Leadership,

Greetings to all as we head into a busy fall season! As part of our ongoing commitment, I want to update you on a topic that I know continues to be of great interest to you and has been a major focus of my team's attention on your behalf for the last eighteen months. In July, the Board of Curators voted to select United Health Care as the insurer for our health plans offered to retirees who are enrolled in both Medicare A&B. In coming weeks, you will begin receiving information on the new Medicare Advantage plans through United Health Care (UHC), selected to best meet the needs of our retirees as well as the university.

The detailed communications regarding plan design and costs will be arriving in late September. Details about these communications and the updated timeline are attached. In the meantime, I want to share that the university has worked in collaboration with UHC to design two plan options for Medicare A&B retirees, both of which offer a lower premium, lower out of pocket cost-sharing and a nationwide access to Medicare providers. With these plans, you will not be limited to the UHC network; you will be able to access care from any provider nationwide that accepts Medicare.

We will also be providing you with information and education on how Medicare Advantage plans integrate with your current Medicare A&B coverage and what that means for any future desired benefit changes. As it relates to this, we will explain the benefits of accessing an employer-sponsored Medicare Advantage plan through the university versus an individual Advantage plan available on the market. We will provide individual support for selecting a plan and enrolling.

For Retirees and Dependents that are not yet Medicare Eligible, the current external market does not yet provide options that we consider to be the best solution for our retirees. Therefore, we will continue to offer university sponsored, self-insured, health plans, but will transition coverage to United Health Care in conjunction with the plans offered to our active employees. For those not yet eligible for Medicare, you will receive information regarding the 2017 plan options and premiums in late September as well.

You may want to save this link where we continue to update information about the transition:

https://www.umssystem.edu/totalrewards/retirement/transitioning_retiree_insurance_to_uhc

And as always, you can contact us with questions at (573) 882-9810, (800) 488-5288, or retirement@umssystem.edu.

Again, I look forward to meeting each of you at the upcoming fall meeting and working to support you through your retirement years.

Sincerely,
Wendy Wiederhold

Sr. Director, Health and Benefits
University of Missouri System



Retiree Medical & Prescription Drug Plans Implementation Monthly Update

Friday, September 2, 2016

Summary

On July 22, The University of Missouri Board of Curators approved the contract with United Health Care (UHC) to offer new Medicare Advantage plan options for retirees and their covered dependents who are enrolled in Medicare Part A & B effective January 1, 2017. The implementation project officially kicked off in late July and since that time a significant amount of work has been done to create a smooth transition for our retirees.

Retiree medical coverage for those enrolled in Medicare Part A & B: Two new fully-insured Medicare Advantage plan options, a Base Plan and an Enhanced option, will be available through UHC. In late September, retirees and their dependents will receive Annual Enrollment materials from the University, including schedule of benefits and premiums. Following that mailing, you will receive a pre-enrollment kit from UHC with additional plan details and information on how to enroll.

Key features include:

- Both plans offer lower premium costs and you will continue to receive the same percentage premium subsidy currently provided by the university.
- Both plans offer a \$0 medical deductible and lower out-of-pocket cost sharing for medical services.
- A nationwide network of providers will be available. You will not be limited to the UHC network, but will be able to use any provider, nationwide, that accepts Medicare at the same cost to you.
- No requirement to select a primary care physician, and no referral necessary to see a specialist.
- As an Employer sponsored Medicare Advantage plan, you will not be subject to many of the coverage limitations that apply to individual Medicare Advantage plans you may have seen on the market. If you, or the university, choose at a later point to move away from the university's Medicare Advantage plan, there will be no penalty incurred to return to a non-Advantage Plan.
- Both plans offer access to SilverSneakers.
- Prescription drug coverage will be insured through Express Scripts, Inc. for both plans.

Retiree medical coverage for those not eligible for or not enrolled in Medicare: Enrolled retirees and dependents who are under age 65 or not enrolled in Medicare Part A & B will be able enroll in the university's Healthy Savings Plan and Retiree Health PPO plans. Beginning January 1, 2017, these plans will be administered by UHC. IN late September, retirees and their dependents will receive Annual Enrollment materials from the University including schedule of benefits, premium rates and the process

for making any changes. You will not receive a separate mailing from UHC if you are on these plans. Prescription drug coverage will continue to be provided through Express Scripts, Inc. for both plans.

UNIVERSITY *of* MISSOURI

DEPARTMENT OF ENGLISH

August 22, 2016

TO: Kitty Dickerson, President, MURA
Tom Henderson, Immediate Past President, MURA

FROM: Marty Townsend, Incoming President, MURA

RE: Report on 2016 AROHE (Association of Retirement Organizations
in Higher Education) Conference in Seattle, WA, August 14th to 16th

Dear Kitty and Tom,

At your request, I was pleased to attend the Eighth Biennial AROHE Conference on behalf of the University of Missouri Retirees Association, and I offer this observational report on my experience. Hosted by the University of Washington Retiree Association (UWRA), this was AROHE's largest conference to date, enrolling some 140 participants from sixty different institutions of higher education, primarily from the east and west coasts with a smaller number from the mid-west and south. Per informal polling, the vast majority of attendees were representatives of their institutions' retirement organizations, like MURA. (More later on who did, or didn't, attend.) Several schools with highly active organizations sent teams of two, three, four, or more. AROHE's president, Patrick Cullinane opened the conference by declaring that, "AROHE's agenda is to *disrupt* retirement."

As a first-time attender with barely a year's retirement and MURA membership behind me, I had a steep learning curve. For the most part, I concentrated on simply learning AROHE's language, issues, and milieu—and then placing MURA within the framework I was observing. The two-day conference followed the usual pattern of many academic conferences: an opening reception/dinner; two keynote addresses, three rounds of concurrent sessions, a resource fair, and ample time for participant interaction. UWRA hosts did a superb job of making everyone feel welcome by facilitating professional and social connections and executing myriad logistics.

This year's theme, "Transforming Retirement: Re-writing Life's Next Chapter," afforded participants an opportunity to consider how their campuses are preparing to address upcoming faculty and staff retirements and what the role of retiree associations should play in aiding those processes. I learned (among other things) that some retiree associations play a much more active role than



MURA does in working with administration, Human Relations, and other offices, in preparing faculty and staff for retirement. I hasten to note that those more active organizations have full-time, paid staff with office space, very different from MURA.

The event's opening keynote, "Transforming Retirement—The Big Picture: What's Coming and Why," set the stage for everything that followed. Speaker Fernando Torres-Gil was extraordinarily well situated to speak to that large theme. A former consultant on aging to Presidents Clinton and Obama and a member of the AARP Foundation (among numerous other credentials), he is professor of Social Welfare and Public Policy and Director of the Center for Policy Research on Aging at UCLA and adjunct professor of Gerontology at USC. Among many provocative topics, he tackled the question "What does it mean to have (potentially) thirty years of life after retirement?" He noted that the "public narrative" about retirement is changing and that we may be the last cohort of enjoy the legacy of the last century of DB and DC (defined benefits and defined contributions). He predicts that the word "retirement" will fade away and he encouraged everyone to think of a "fourth quarter" of life during which we undertake various new challenges and opportunities. Contrary to his professional training, his own focus for the future, he says, is on children.

Day-two's keynote speaker, Carole Goldberg, also an Obama appointee, is a renowned scholar of Native American law and immediate past vice chancellor for academic personnel at UCLA. Her talk described research and actions that she and her colleagues took to revamp UCLA's retirement model, a model that not only met with enthusiasm but also saved the university substantial money while simultaneously employing new, young tenure track faculty. She described several new models for how higher education can reshape retirement for its employees, drawing on data from a survey of UC emeriti titled *The Virtual 11th Campus* (<http://cucea.ucsd.edu/documents/AVirtualEleventhCampus.pdf>). Produced by CUCEA (Council of University of California Emeriti Association), the report's key insight is that *retirement isn't a severance of a relationship, but a reconfiguration of a relationship*. Power Points slides from both keynotes are to be made available on AROHE's website.

Overall, I believe my time, and MURA's investment in supporting my attendance at AROHE, were worthwhile. Some of what I came away with includes:

- Awareness of the many different configurations of college and university retirement organizations. MURA, for example, is a Retirement Organization (RO), not a Retiree Center (with centralized services, sometimes including a "Retirement Counselor").
- Surprise at the number of RO's (not just RC's) that have dedicated space on their campuses, with paid staff.
- Pleasure on learning that some universities work hard to make retirement a transparent, positive, life-enriching transition.
- Resonance with one of Goldberg's citations, taken from a typical faculty respondent to *The Virtual 11th Campus*: "I don't want to stop working. I just don't want to be employed."
- Intrigue with the concept of "universal membership" for retirees in their institutional RO; in other words, simply by virtue of retiring from a college or university, one is automatically a

member of the RO. No “joining” is required; dues are voluntary or nonexistent. This caused me wonder why MU’s was established the way it is.

- Intrigue with the concept of “Emeriti Colleges,” wherein faculty who choose to affiliate continue to be active in teaching, research, and service. Just one example is The Emeritus College at Arizona State University (my *alma mater*), which has an annual budget of \$175,000, provided by the provost; is situated in a prime campus location; is headed by a dean, Dr. William Verdini; enrolls some 500 retired faculty members, 200 of whom are actively involved; and is focused on intellectual activities, rather than social events.
- And even more intrigue on learning that some universities have opened unused dorm space—or even built individual or group homes—for retirees who want to live on or near campus.

With regard to AROHE as an organization, it is obvious that AROHE’s Board of Directors takes its professional responsibilities seriously. I was impressed with the high-level policy issues that were discussed at the conference, especially as represented in the two keynote speakers’ remarks and discussion. Further, AROHE leadership seems poised to “gear up” the organization to be more responsive to its perceived need for change and that its audience needs to enlarge:

- Future AROHE conferences should encourage representatives from higher administration—presidents, chancellors, provosts, HR directors, and the like—to ensure that retirees’ needs are being communicated.
- New affiliations with higher administration should be sought, so that administrators are better informed about the resources retirees offer and what retirees’ needs are.
- Leadership wondered whether accreditation documents call for retirement data, and if not, why not?
- The incoming president acknowledged that she has a long list of recommendations that will have to be prioritized.
- The conference was closed with a call to “Go forward and *disrupt* the current retirement paradigm!”

I would be pleased to discuss any of this information with you and MURA members at your request. Thank you for the opportunity to represent MU at this conference.

CC: MURA Executive Board