

# RETIREMENT: TIME TO DISRUPT AND TRANSFORM

by Caroline Kane, President, and Patrick Cullinane, Immediate Past President, Association of Retirement Organizations in Higher Education



**D**isrupt and transform were two words that carried the tone of the AROHE (Association of Retirement Organizations in Higher Education) 8th biennial conference at the University of Washington in Seattle. Plenary sessions on Transforming Retirement: The Big Picture – What’s Coming, and Why and Transforming Retirement Programs and Services challenged participants to confront the realities of aging higher education faculty and staff and the pathways for retirement planning, transitions, and next-chapter lives seriously needing infrastructure repair.

## MUCH MORE THAN BENEFIT ADVOCACY NEEDED

In our transformation efforts, Fernando Torres-Gil, UCLA Professor of Public Policy and former director of the US Administration on Aging, warned against retirees and retirement associations, including AROHE, becoming solely benefit advocacy groups. Society already believes that higher education faculty and staff have much better financial and other benefits than most citizens. Instead, Torres-Gil advised us to reassess and redefine the role of active and retired faculty and staff in ways that show value to the public, to society, and to governance.

## RETIREMENT LIAISON

Responding to this call-to-action, Carole Goldberg, Vice Chancellor of Academic Personnel (Emerita) at UCLA, addressed the need to rethink and transform retirement in academia. Colleges and universities are dealing with a large professoriate of baby boomers who are tenured, enjoy improved health and face no mandatory retirement. By rethinking faculty/staff retirement, universities can open positions to an increasingly diverse population of university graduates and upcoming Ph.D.s, while retaining the talent, contributions and institutional knowledge of longtime faculty and employees who wish to remain engaged. This experienced employee population can provide a resource for dealing with the problems that higher education and society face.

In order to rethink retirement, it is important to acknowledge reasons for the reluctance of many faculty to retire. They share concerns about loss of identity, finances, resources to continue their work, and a sense of finality. These reasons need to be addressed with a university-expanded role in retirement, reflecting, as Vice Chancellor Goldberg said, “a radical re-conception, a re-configuration of that relationship.” Higher education requires a new vision of the university’s role in retirement. This new role needs

to focus on educating faculty/staff about the potential value of retirement, providing real incentives for retirement (both before and after), providing recognition for the contributions of emeriti and retirees, and creating real opportunities for faculty/staff to continue contributing to the university and society at-large.

To this end, UCLA recently created a Faculty Retirement Liaison position. This person advises, advocates and helps faculty plan for, structure and negotiate pre- and post-retirement arrangements with their departments. The initiative serves as a model in creating individual paths for retirement and includes workshops for faculty on planning for retirement while still maintaining active engagement during emeriti status.

## CONFERENCE PRESENTATION ACCESS

Other conference sessions continued to focus on the conference theme of Transforming Retirement: Rewriting Life’s Next Chapter. Roger Baldwin from Michigan State University presented his research findings in Under the Microscope: Investigating the Benefits and Impact of Retirement Organizations in Higher Education. His and other conference presentations can be accessed on the AROHE website at <http://www.arohe.org/2016-Conference-Review>.

## AROHE FUTURE GOALS

Goals for AROHE's future were also presented at the conference:

- 1** Expand active and frequent communication among members, the public, and leaders in higher education through a variety of media. Communication provides AROHE visibility and an advocacy voice. Better communication also provides platforms that showcase contributions of retired faculty and staff in their communities.
- 2** Establish broader connections with regional, national and international organizations that also focus on an aging, retiring population. From AARP and ENCORE through professional organizations, AROHE's interaction shares best practices and helps AROHE members learn other information that contributes to positive retirement in higher education.
- 3** Increase membership nationally and internationally. Greater membership not only increases the voice of AROHE but also engages more institutions that may gain insights for their own retiree populations. Broader engagement helps transform retirement conversations.
- 4** Develop a sustainable funding strategy. While AROHE is an all-volunteer organization, our effectiveness would increase with a small cadre of paid, professional staff focused on each of our goals, helping members collaborate on issues of higher education retirement. Over the next 12-18 months, Board Members will explore income streams enabling staff recruitment even as these Board Members use their own diverse talents to work actively on AROHE's goals.

## COME JOIN US IN TRANSFORMING RETIREMENT

AROHE provides a variety of services to its members and member organizations, including members who are forming new retiree organizations or developing new programs for retired faculty and staff. Membership benefits include: links to useful resources, descriptions of successful practices, results of surveys, profiles of AROHE members, and a new mentoring program which pairs new or less-experienced members with more-experienced members for one-on-one consultation.

Learn more at <http://arohe.org>. You may also contact AROHE directly by emailing [info@arohe.org](mailto:info@arohe.org) or calling (213) 740-5037.