Final Report
The WSU Emeritus/Retiree Center
Feasibility Study
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I. Introduction and Background

A. The Graying of America

The demographic and social trends that will shape and challenge U.S. society as a whole in this new millennium will almost certainly continue to present new challenges and opportunities for higher education well into the foreseeable future. As is generally well known, the population is aging and there is every reason to believe this trend will continue. In 1900 persons over age 65 numbered about 3 million, or 4% of the U.S. population; in 2000, 35 million persons were over age 65 representing 12.4% of the population. The U.S. Census Bureau projects that by 2050 there will be 68.5 million persons over 65 representing almost 22% of the U.S. population (Jillian and Kocobian, "An Aging Society" in Social Problems, N.J.: Prentice-Hall, 2004, pp. 288-9). Among the most immediate challenges for society will be the impact of the Baby Boom generation—those born between 1946 and 1964—that is now rapidly approaching traditional retirement age in record numbers. There are also many indications that this age cohort will not retire in traditional ways. Survey findings from the late 1990s, for example, reveal that fully 80 percent of these Boomers expect to continue working at least part-time during their retirement years and more than one-third plan to continue working for the sake of the enjoyment that work provides (Roper Starch, "Baby Boomers Envision Their Retirement: An AARP Segmentation Analysis," Roper Starch Worldwide, Inc. and AARP, 1999, from the AARP's Research Center [http://research.aarp.org/eco/bloomer seg.html]). These changing demographics and this anticipated shift to a "working retirement" beshadow new opportunities as well as a number of challenges for the society. Areas such as Social Security, Medicare, housing and maintaining a meaningful, active retirement will be among the issues that need creative thought and planning for this expanding older population.

B. Aging of the Professoriate

Even more than the Boomers in the general population, among college and university faculty there also exists a disproportionately large older age cohort—those born in the late 1930s and early 1940s. By the late 1990s, nearly a third of the country's full-time professors were 55 or older, compared to about 25 percent a decade earlier (Denise Magner, The Imminent Surge in Retirements, "Chronicle of Higher Education", 46:28, March, 2000). These represent the professors who were hired to teach the Boomers entering higher education in the late 1960s and early 1970s (Clark and Hammond, "Introduction: Changing Retirement Policies and Patterns in Higher Education" in To Retire or Not? Retirement Policy and Practice in Higher Education, Philadelphia: University of Pennsylvania Press, 2001). As Denise Magner (2000) points out, this trend is particularly evident at state universities and community colleges since they experienced the greatest expansion during this period as they accommodated the Boomers. Recent data (see Table 1) from the National Center for Educational Statistics (1987, 1992 and 2002) make this trend clear.

<table>
<thead>
<tr>
<th>Year</th>
<th>55-59</th>
<th>60-64</th>
<th>65+</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1987</td>
<td>13.2%</td>
<td>12.6%</td>
<td>13.9%</td>
<td>25.8% (24.7%)</td>
</tr>
<tr>
<td>1992</td>
<td>14.4%</td>
<td>8.2%</td>
<td>6.9%</td>
<td>25.5% (25.6%)</td>
</tr>
<tr>
<td>1998</td>
<td>13.1%</td>
<td>13.1%</td>
<td>6.7%</td>
<td>28.0% (31.4%)</td>
</tr>
</tbody>
</table>

*National data on the total % of faculty 55 years and older for all types of higher education institutions are in (1).

High levels of job satisfaction are also evident in higher education where research findings show that the vast majority of faculty members—more than three-fourths—report being “very” or “somewhat” satisfied with their jobs (Carolyn J. Mooney, “Survey: Statistical Portrait of the American Professoriate,” Chronicle of Higher Education, February 7, 1990). This suggests the existence of a large and growing pool of talented individuals in higher education that generally agrees what they do but may also be interested in leaving full-time employment for other part-time volunteer and paid alternatives. Among the challenges and opportunities is the question of how colleges and universities might utilize the knowledge, experience, energy, expertise, institutional memory and commitment of these graying but largely content personnel to enhance the educational enterprise. Is this an overlooked resource to higher education institutions? Could the integration of retired personnel in meaningful ways within the university be a “win-win” opportunity for both the university and retired personnel?

C. Quality of Life in Retirement

Literature on retirement is replete with references to the idea that maintaining an active retirement has many positive benefits. Benefits commonly listed include physical, psychological and social rewards for a person remaining active and connected to the community and issues larger than themselves. A healthy and active retirement is also considered a means by which the rising costs of health care can be managed more effectively.

Many colleges and universities, whose personnel age-profiles often mirror national trends, are finding that if avenues for retired personnel are developed that permit continued active involvement in the ongoing activities of the institution, the universities stand to benefit as do retirees who can maintain meaningful institutional...
connections and relationships. Without much effort dozens of possibilities present themselves for significant ways that retirees could contribute to academics, student life, university advancement and partnerships both inside and outside the organization, enhancing the quality of life for the retiree.

D. Institutional Building: The Concept of a WSU Emeriti/Retiree Center

As a vehicle for integrating or reintegrating retired personnel into the university it is proposed that WSU establish an "Emeriti/Retiree Center." Such centers are referred to by various designations (e.g., retirement associations, emeriti colleges, emeriti/retiree relations centers) at other higher education institutions around the country. Entities so labeled are not uncommon at large research institutions both public and private. They appear less common among smaller institutions, although no systematic information exists about how widely the idea of a campus retiree organization has spread among all institutions of higher education nationally.

The initial, basic and tentative concept for an Emeriti/Retiree Center at WSU is to draw on the knowledge, experience and expertise of retired staff, faculty and administration to further the mission of WSU while cultivating and sustaining their own talents and interests. The Center would provide institutional connections between retired personnel and needs of the university in such ways as serving as guest speakers, supervising student research, teaching a class, tutoring/advising/mentoring students across the university. Others may choose to apply their talents to fundraising with alumni, community or corporate benefactors. Still others may wish to enhance the buildings and grounds, or establish business and community partnerships with the private and non-profit groups in the community and region. Overall, the goals of the Center would be to provide educational programs and social activities for retirees while providing opportunities for service to the WSU community as well.

E. Benefits of a WSU Emeriti/Retiree Center

WSU as a whole would benefit from the establishment of a Center in a number of specific ways. A Center could offer services, for example...

1. to students and academic programs:
   a. guest lectures, presentations, substitute or adjunct teaching for regular faculty;
   b. teaching first-year student orientation courses as needed;
   c. tutoring and mentoring students;
   d. availability of part-time office staff for temporary employment;
   e. assistance with academic program development and assessment;
   f. assisting with or supervising independent student research.

2. to campus offices:
   a. helping the Admissions Office with recruitment efforts;
   b. assisting Residence Life Staff with programs;
   c. assisting the Career Services Office with student career development and advising;
   d. assisting the Alumni Affairs Office with emeritus faculty participation in alumni events, including reunions and homecoming celebrations;
   e. assisting University Advancement with public relations and fundraising.

3. to the University:
   a. serving by invitation on University committees and panels;
   b. informing WSU personnel regarding pre and post retirement planning;
   c. providing a community and regional outreach to other organizations within the service area.

4. to the community and region:
   a. providing speakers, consultants and advisors to local and regional organizations;
   b. offering collaborative programming with other WSU and community organizations to meet the range of adult educational needs.

These are examples of the range of benefits that could develop depending on the pool of available talent and level of involvement of retired personnel in the Center.

II. Feasibility Study and Methods

A. Emeriti/Retiree Center Survey and Results

In January, 2004 a survey was undertaken to determine the level of interest and support for the Emeriti/Retiree concept as well as the extent to which both current and retired faculty, staff and administration would be likely to participate in and use the services of such a center. Questionnaires were sent to 226 WSU retirees for whom addresses were available and to 659 currently employed WSU staff, faculty and administrators. Of these, 53 of the 226 retirees (23%) and 141 of the 659 current employees (21%) responded to the survey. Questionnaires were also sent to 101 current heads of campus offices with replies coming from 11 (11%) of them.

Nearly 8 out of 10 (79.3%) of the retired survey respondents indicated that the idea of creating an Emeriti/Retiree Center seemed like a useful addition to WSU while 11.3 percent said no and 9.4 percent said they were uncertain. Currently employed WSU respondents were evenly more supportive of the idea with 85.5 percent saying it would be a useful addition to the university while 12.3 percent indicated they did not support the concept and 2.2 percent were undecided. Of the 11 office heads responding, all but one (91%) indicated support for the idea. All 10 of the supporters indicated they would participate by involving retired staff, faculty or administrators in the services provided by their offices although only one out of ten were able to offer specific suggestions as to how they might use retirees.

All survey respondents were also asked if they would participate in Center activities if one were created at WSU. Their responses are summarized in table 2 below.
Table 2 (N = 193)

If an Emeriti Center were created, would you participate in Center Activities?

Not at this time  Infrequently  Occasionally  Frequently  Very Frequently
53 (28%)  25 (13%)  75 (39%)  35 (18%)  5 (2.6%)

When asked what benefits or incentives they would suggest to encourage participation, several themes emerged from their responses. Most frequently mentioned was the need for a "place" connected to campus with parking space and good facilities with regular hours where people could gather to socialize, discuss, have Internet access and receive some office support while performing Center related activities. Another frequently mentioned theme was the importance of recognition ceremonies and social activities perhaps centered around breakfasts or lunches. A third theme centered around having free or discounted admission to WSU events, library access, bookstore vouchers or discounts, reduced or no cost admission to classes as well as access to other university services such as a fitness program. Still another cluster of responses emphasized opportunities for intellectual stimulation in the form of expert presentations, high quality panels and discussion groups, interaction with faculty and students (e.g. mentoring, tutoring, teaching) as well as informational programs (e.g. pre and post-retirement planning). While some respondents mentioned monetary compensation (e.g. compensation for expenses associated with projects or reimbursement for travel to promote WSU to new students or alumni) others said meaningful participation would be a reward in itself. One noteworthy theme that seemed to permeate many of these responses was the importance of having a feeling of belonging and not feeling marginalized.

Another indicator of interest and support is the extent to which survey respondents expressed willingness to in some way serve in helping to create or fund an Emeriti Retiree Center. When asked this question, 38 percent of the respondents reported they would (or could) not serve in any way. The remaining 62 percent, however, indicated they were willing to help in a variety of ways ranging from serving on various committees to participating in a focus group as part of the feasibility study. Many indicated they were willing to participate in more than one of the possible options listed on the questionnaire and several offered additional suggestions of their own. Several of these respondents were subsequently contacted and did participate in a focus group held on campus on April 1, 2004.

In addition, this feasibility study also involved an extensive review of websites and printed materials. Since there is no national directory or any detailed listing of such centers, these sites were largely identified by relying on the suggestions of various key informants already familiar with similar initiatives in higher education around the country. For Minnesota, this effort involved examining the websites for all 4-year colleges and universities in the state. Although none were identified in Minnesota, this search did lead to the identification of exemplary models elsewhere in the U.S. These were then contacted by e-mail and selected for site visits or phone interviews.

B. Review of Higher Education Websites and Printed Materials
1. U.S.

a. University of Southern California, Emeriti Center-Emeriti College;
   www.usc.edu/org/emeriti_center
b. University of California at Los Angeles, Emeriti/Retiree Relations Center;
   www.human蟑螂ca.edu/emeriti-retirees
c. University of Washington, UW Retirement Association;
   http://depts.washington.edu/retirement/uwra/
d. Indiana State University at Bloomington, Emeriti House;
   www.indiana.edu/~emeriti/index.html
e. Emory University, Emeritus College; www.emory.edu/emeritus/who5.htm
f. Big 10 Universities Retiree Association (10 websites);
   www.umich.edu/~hrpc/umr/big10/index.html
g. Indiana State University at Terre Haute, Senior Scholars Academy;
   www.indstate.edu/scholars
h. Oklahoma State University, OSU Retirement Association;
   www.okstate.edu/emeriti-
   i. Cornell University, Cornell Association of Professors Emeriti;
   www.emeritus.cornell.edu/index.html
j. University of Arizona, UA Retirement Association; http://info-center.ccit.arizona.edu/~retirees/
k. University of California at Berkeley, UC Berkeley Retirement Center;
   http://thecenter.berkeley.edu/index.htm
l. University of North Carolina—Asheville, Asheville, North Carolina Center for Creative Retirement; www.unca.edu/nccr/
m. International College (Naples, FL), Center for Creative Retirement;
   www.internationalcollege.edu/cr/

2. Minnesota - 4 year colleges and universities. No reference was discovered to
   an emeriti/reitre center concept as part of their institutional webpages for the following schools;
   a. Augsburg College
   b. Benedict State University
   c. Bethel College
   d. Carleton College
   e. The College of Saint Scholastica
   f. Concordia University
   g. Gustavus Adolphus College
   h. Hamline University
   i. Macalester College
   j. Metropolitan State University
   k. Minnesota State University Moorhead
   l. Minnesota State University Mankato
   m. Saint Cloud State University
   n. Saint Mary's University of Minnesota
   o. Saint Olaf College
   p. Southwest State University
   q. University of Minnesota - Duluth
   r. University of Minnesota - Twin Cities
   s. University of Saint Thomas
3. Other related websites reviewed:
   1. Elderhostel Institute Network; www.elderhostel.org/ein/intro.asp
   2. Assn. Of Retirement Organizations in Higher Education (ARHOE);
      www.RetireesU.org

C. Emeriti/Retiree Center Site Visits and Interviews (Exemplary Models)

1. University of Southern California (Site Visit)

Visit hosted by: Ms. Elizabeth Redmond, Executive Director; Dr. Wm. Faith, Professor Emeritus and Director of Emeritus College; others interviewed Ms. Harriet Servis President of USC Staff Retirement Association; Ms. Sally Emerson, Past President of Staff Retirement Association; Dr. Paul Hadley, Professor Emeritus and retired V.P. of Academic Affairs.

The USC Emeriti Center was established in 1978 for the purpose of providing service and support for faculty and staff prior to retirement and throughout their retirement years. Educational, social and service opportunities characterize the programs and activities sponsored by the Center.

USC has separate faculty and staff retirement associations for which the Emeriti Center provides executive services and some joint programming for both faculty and staff. The Center serves about 600 faculty and 800 staff of which about 300 (21%) are actively involved, and has a total budget of about $400,000. Two full-time and two part-time staff along with volunteers staff the Center. There are separate advisory boards for both the Emeriti Center and the Emeritus College that meet periodically.

The Emeriti Center provides information and planning about retirement, advocates for retirement benefits, including a “Gold Card” of privileges for retirees, support for the Emeriti College, annual faculty and staff awards, a Living History Project, service opportunities, and educational and social gatherings. The Emeriti College sponsors funded research grants, student mentoring and orientation, distance learning and a speaker’s bureau of retired faculty to the surrounding community and area.

The Emeriti Center has several offices in the Andrus Gerontology Center out of which they function. Plans are to include the Center in a new Student Center planned for the campus.

2. University of California at Los Angeles (Site Visit)

Visit hosted by: Ms. Eddie Murphy, Director

UCLA’s Emeriti and Retiree Relations Center was established in 1967, and is among the oldest such retirement organizations in higher education. Their mission is to serve as connecting link between retirees and the University, provide educational programs and services and enhance the quality of life in retirement in a professional and caring environment.

The Center provides executive services for the faculty and staff retiree associations, which are separate organizations. About 300 retirees participate out of a total of 6,000 (5%). The total budget is about $250,000 per year. Two full-time and two part-time paid staff and volunteers run the office. There is no official advisory board established for the Center.

The Center provides a range of services focusing on retirement benefits (social security, health, financial planning), university related activities and community relations. A range of privileges are also extended to faculty and staff upon their retirement.

The Center has a suite of ground-floor offices in Rolfe Hall which also houses some academic programs as well.

3. Emory University, Atlanta, Georgia

E-mail and phone interview. Dr. Eugene Bianchi, Director of the Emeritus College

Emory University established the Emeritus College for retired faculty as a pilot project in August, 2001. The purpose of the College is to enhance the relationship between the university and its emeritus faculty for the benefit of Emory’s educational mission as well as for the greater welfare of its emeriti and the wider community.

The College has at present a small staff and budget. The Director is a half-time paid staff as is the half-time secretary. Two paid graduate students also help to run the Emeritus College office. An estimated 100 of the 300 (33.3%) retired faculty participate in one or more activities over the course of an academic year. The total budget is about $95,000 per year. An advisory board provides guidance to the Center.

The College sponsors a range of activities for retired faculty. Included among the activities are breakfast and lunch discussions, women’s conversations, adopt-a-hall (residence hall), lectures, spring and fall receptions (for new retirees), film forum, retirement seminars, a living history project (of Emory’s history), off-campus lectures, faculty art exhibits, book clubs, and others. A number of free or discounted programs and services are extended to retired faculty.

The Emeritus College has four offices within an existing academic building on campus.

4. Indiana State University - Bloomington

Interviewed by e-mail: Dr. Susan Ekland, retired Associate Dean of Faculties and founding director of the Emeriti House, and Ms. Linda Pearson, Academic Specialist and current Coordinator of the Emeriti House.

ISU opened a newly renovated home (Emeriti House) on campus in February, 2004. The opening of the House capped a twelve year effort to establish an office to