serve emeritus faculty. The purpose of Emeriti House is to enhance the connection between IUB emeriti and the University. It supports continued scholarly activities and will work with academic departments and other units to identify ways that emeriti could volunteer their skills to the University.

The Emeriti House is staffed by a full-time office manager. Other University staff devote portions of their full-time duties to providing specific assistance to the House in areas such as administration, technical support of computers, and budget oversight. Since the House has just opened recently no figures are available as yet concerning participation rates. IUB has an estimated 650 retirees who are potential participants not including spouses and widows who are also invited to participate. The operating budget is yet unknown at this time since the House is so new. Renovation costs for the House were about $125,000. An appointed Board of Directors provides guidance for the House.

The House provides meeting rooms, a computer cluster, clerical support, fax services, telephone messaging to support the continuing scholarly work of retired faculty. Plans are to offer programs including brown-bag lunch discussions, retirement education, writing personal biographies and computer classes. Too, efforts are being made to develop linkages to volunteer programs both on and off campus. Student tutoring and mentoring, hosting programs for visiting international faculty and new faculty recruitment, substitute teaching when regular professors need to be away are among the ideas being pursued. Privileges (e.g., free bus pass, discounted parking permits, etc.) are provided to retiring faculty.

The newly renovated two story house provides abundant space for this new program to develop on campus.

D. Other Related Site Visits:

1. International College, Center for Creative Retirement, Naples, FL.

International College is a newer (11 year old) private, SACS accredited, career-oriented college located in the Naples area and at three other sites in southern Florida. The College enrolls about 1,400 students ranging from traditional to non-traditional students in career-track bachelor's and master's programs that are in demand within their service region.

The Center for Creative Retirement was created in 1996 as "...a peer-led educational endeavor that develops courses, programs, events and experiences providing a means for older adults active participation and continuing involvement in the learning process...". Largely volunteer instructors along with some I.C. regular faculty offer short (4 session) to longer (3-7 week) courses three times each year (Winter/Spring, Summer and Fall) on topics of interest to CRC members and instructors. Topics include a wide range of traditional liberal arts areas such as poetry, literature, art, history, philosophy, science, religion and others. Several hundred adult seniors pay a membership of $125/year to become CRC members. This permits CRC members to enrol in as many courses as they wish during the year. One full-time staff person coordinates the entire program. About 50% of the annual budget comes from I.U., and 50% from CRC membership. The goal is for the CRC to become fully self-sufficient.

Courses are sometimes offered at one or more private living communities in the Naples area. Plans are to seek corporate partners that pay a fee for CRC courses to be offered in the workplace at times when any employee can attend in addition to CRC members.

Notable to this program is the creative focus of programs for the adult senior population that inhabit this largely retirement-oriented area in large numbers. Also, the level of involvement by adult seniors and community members as volunteer instructors is inspiring. The CRC appears to be a popular and growing program. The implications for the WSU ERC might be in terms of providing a range of programming to adults in the Winona community and larger service region. Perhaps this could be accomplished in partnership with the WSU Learning Club, Elderhostel, or the Vital Aging Network.

2. University of North Carolina – Asheville, North Carolina Center for Creative Retirement, Asheville, NC

The North Carolina Center for Creative Retirement at UNCA is an exemplary, award-winning, national model of creative programming for seniors. Established in 1988 the NCCR is committed to "...promoting lifelong learning, leadership and community service opportunities for retirement-age individuals. Annually, the NCCR serves about 1,300 Asheville-area residents with year-round local programming and educational travel and 300 people from outside the area who participate in periodic workshops, seminars and conferences. Located in their own building (The Reuter Center), a 20,000 square foot building on the UNC campus, the Center provides space that includes seminar rooms, classrooms, a computer room, an arts and crafts room, a large multipurpose room, a café and two commons areas along with staff offices. The $4.3 million dollar building was funded from private sources.

The Center has five full-time staff members. It is considered a department within the University and the Director reports directly to the Chancellor (President). There is a Center Steering Committee that provides overall direction for the Center, and nine standing committees (Facilities, College for Seniors, Fundraising, Finance, Programs, Projects, Membership, Planning and MCCP (marketing, communication and public relations). The annual budget is $430,000, 35% of which comes from the State; the balance comes from membership fees, special events and gifts. Annual membership is $112 for fall and spring terms; fees are on a per course basis during the summer term. About 200 volunteers help to staff committees, events and classes.

Programs sponsored by the NCCR are directed at both area residents and non-area residents. Area residents can become involved in the following programs: College for Seniors (by far the largest program, encompassing an array of about seventy-five courses per term taught by over one-hundred volunteer instructors and NCCR members), Leadership Asheville Seniors, Intergenerational Co-Learning, Behind-The-Scenes Tours, Intergenerational Computer Literacy Program, Community Service Program, and The Unretirement Option. Non-area residents may register for one of two
programs: Creative Retirement Exploration Weekend and Steps Toward a Creative Retirement. Planning is underway to include more programming for those who are in the early stages of planning for retirement.

NCCCR provides a model for programming for pre-retirees as well as for the retiree population both among WSU personnel and within the community and region. The WSU ERC might consider at some future point the expansion of its programming along the lines of the NCCCR, as an outreach function consistent with its goal of providing educational programs.

E. Focused Groups
1. April 1, 2004: Current and Retired WSU Faculty and Staff

Several of the earlier survey respondents who had expressed interest in doing so were later contacted by phone and invited to participate in a focus group on campus. A mix of sixteen current and retired faculty and staff were able to come together on April 1 for about 1 1/2 hours. After being briefed on the progress of the feasibility study, they then devoted the remainder of the time to a facilitated discussion focusing on their ideas about the kinds of programs, services and activities an Emeriti Retiree Center could provide. The session also focused on the kinds of incentives, rewards and types of recognition, such as a "Warrior (or Purple) Card" of privileges, that would be most desirable for WSU retirees who choose to participate in Center activities. Participants were also asked to suggest alternative titles for the Center. All ideas were recorded on flip charts and are reflected throughout this feasibility study report.

2. April 13, 2004: WSU Retiree Breakfast

About thirty retired faculty and staff gathered for the quarterly Retiree Breakfast hosted by the University. Retirees were briefed on the progress of the Emeriti/Retiree Center feasibility study and then invited to provide their reaction to and ideas about the programs and services they would be interested in seeing the Center sponsor. These have also been incorporated in this report.

III. The WSU Emeriti/Retiree Center: A Model

The following proposed model is not intended to be prescriptive or final but to provide a foundation for discussion. The model proposed is based on the thoughts and research of the authors and is offered for consideration to the various campus constituencies.

Further, since there is no precedent for this Center on the WSU campus, new transformational thinking and organizational adjustments will likely be necessary in order to accommodate this new entity within the organizational fabric of the university. Coming to recognize retired personnel as a resource and actively pursue the development of avenues for integrating them into University life will require conscious effort.

A. Title

The title of the Center is best determined by a representative group (or the membership of the center as a whole) of current and retired faculty and staff who become the first Steering Committee of the Center. For the purpose of this report, continuing discussion and until such time as a Steering Committee may be created, the Center will be referred to here as, "The WSU Emeriti and Retiree Center" (ERC).

B. Mission and Purpose

1. Mission

The basic mission of the ERC as tentatively conceived is to support the mission of WSU and enrich the campus community as well as the lives of retired staff, faculty and administration by providing institutional connections between the university and retirees who may wish to continue their intellectual and social participation in collegial life and service to the University.

2. Goals (Educational, Social, Service)

The goals of the ERC are to encompass educational, social, and service opportunities, as many similar organizations do. The educational goals might involve items such as a range of short classes on a variety of topics (e.g., computers, retirement planning, investment planning, and classes on a range of contemporary topics of academic interest); taught perhaps by volunteer faculty, staff or members of the community. Additionally, educational debates, colloquia, travel and partnering with the WSU Learning Club and the range of programming they provide is conceivable. Too, the educational goal could include seeking corporate and private funds to support the continuing research activities of retired faculty and other personnel.

Maintaining and enhancing social relationships is also an important goal. Recognition and social events like the current Employee Recognition Ceremony and retiree breakfasts, along with new events like book clubs, speakers, discussion groups, fitness activities and other similar events that permit retired personnel to remain socially connected at the University could be developed.

Service to the University in many and varied ways enables retired personnel to maintain institutional connections while providing a needed service in support of academic affairs, student life, university advancement and other areas of the university. Mentoring or tutoring students, teaching an orientation class, guest speakers in classes, ushering at university cultural or athletic events, assisting with campus tours, supporting alumni development, developing a speaker's bureau, sponsoring conferences on creative retirement in partnership with the WSU Learning Club, Elderhostel, or Vital Aging Network are illustrative but not exhaustive of the services that retired personnel could offer to the University.

C. Clientele
The primary clientele for the ERC are retired staff, faculty and administration of WSU. Also, of importance however, are those staff, faculty and administration who are approaching retirement and would like to become involved with the ERC and some of its programs, activities and services. Finally, at some future point, following discussion and approval from the ERC Steering Committee, University administration and campus constituencies, retired persons within the Winona community and service region who would like to establish a relationship with the University through the ERC could be considered as an additional clientele base.

The estimated size of the primary clientele base at present is about 300. It is unknown at this point what size the pre-retirement clientele base might be since no age profile of current WSU personnel is available.

D. Structure

The ERC organizational structure will require a combination of paid and volunteer positions. The following positions are recommended for consideration:

1. Director (20-40 hrs./wk. total); or two Co-Directors (20-40 hrs./wk. total)

Initially, it is expected that during the first year in which the ERC is established, the Director or Co-Directors will devote a considerable number hours per week creating the ERC office; recruiting and establishing the Steering Committee and standing committees; visiting and promoting the ERC among campus offices, departments and programs; developing and implementing a modest range of programming and services; and developing communication tools (newsletter, website) among other things. Once the office, Steering Committee and standing committees are established and functioning more time can be devoted to developing an array of educational, social and on-campus service opportunities. If this position is initially part-time, as the ERC participation and support grows consideration will need to be given to increasing the position to three-quarter or full-time.

The general duties of the ERC Director or Co-Directors include but are not limited to the following:

a. serve as the liaison between the ERC and the WSU administration and WSU Foundation;
b. develop and help implement the mission and goals of the ERC consistent with the direction set by the Steering Committee;
c. provide general oversight of program development and management of ERC functioning.

2. Program Assistant/Office Manager (Office Administrative Specialist; 20-40 hrs./wk.)

A Program Assistant/Office Manager is essential for the ERC to be successful. The experience of other schools with Centers of this type has shown that to increase participation, the Center must be open often and during regular business hours. Research and experience in the University of California System has revealed that participation by more retirees increases the longer the Center is in existence and the more staff time that is provided and, therefore, the more programs and services that are available. Therefore, a Program Assistant/Office Manager position is considered important.

The duties of the Program Manager/Office Manager include but are not limited to the following:

a. serve as the office manager for the ERC;
b. coordinate the programming of the ERC relative to program goals;
c. assist the Communications Committee with creation, publication and maintenance of the ERC website and newsletter;
d. create and maintain a database of retired WSU personnel.

3. Student Assistant (One, part time, Graduate/Undergraduate/Intern/Student Help or Work Study; 10-15 hrs./wk.)

Since the Program Assistant/Office Manager will have considerable responsibility within the ERC, one student assistant is needed in order to perform routine office duties. The duties of the student assistant are among other things to take direction from the Program Assistant/Office Manager regarding general office duties and ongoing ERC projects.

4. Steering Committee (Volunteers): five faculty (3 retired, 2 current), five staff (3 retired, 2 current), one WSU Foundation member, one WSU alumni, one community member. The duties of the Steering Committee will be to provide oversight and direction to the ERC, and will meet three times per calendar year. The duties of the Steering Committee will not supplant the authority and responsibility of the WSU President regarding the ERC structure, functioning or resources.

5. ERC Committees (Volunteer): Initially, five standing committees will be constituted. They include: Education Committee (educational programming, research grants), Social Committee (recognition events, social events), Service/Outreach Committee (establishing volunteer and/or paid opportunities to serve the WSU campus, community and region), Communications Committee (create, maintain and publish an e-newsletter and an ERC website), and a Fundraising Committee (corporate, foundation, and private giving). Additional committees may be established as needed.

E. Organizational Placement

The ERC will potentially provide service to the larger campus community — academic affairs, student affairs, university advancement, facilities, as well as the larger Winona community and service area. Further, since there is no precedent for the ERC within the WSU organizational structure, the creation of the ERC will likely require adjustments for campus personnel planning for and re-integrating retired personnel as a new resource on the WSU campus. Therefore, it is recommended that the ERC report directly to the President's Office in order to facilitate the integration of this new resource entity into the fabric of the WSU organization.

F. Programming and Services: