

2017 Big 10 Retirees Association Conference Report
Together We Soar - Best Practices & Ideas for Growing Your Retirees Association
hosted by Purdue University - August 25-27, 2017
submitted by Rita Kean & Doug Zatechka - 9/5/17

Representatives from Purdue as well as the other Big 10 universities were *very* complimentary to UNL for hosting the 2016 Big 10 Retirees Association Conference. Comment made: *UNL conference planners set the bar high for future conferences.*

Overview

Purdue did an exemplary job with advanced communications and descriptions of the program, hotel accommodations, meals and campus tours. Their hotel facility is part of their student union, has been updated and includes excellent guest rooms, meeting rooms and lounges. All buildings appeared to be in excellent repair and were exceptionally clean. ALL the Purdue staff who we met, including student reception desk employees at the hotel, the chefs and other dining personnel were all most friendly and welcoming. Meals were great! We found the students, staff, and administration very accommodating and very proud of their institution without any degree of superiority. Tours reflected what Purdue considers among their "star" locations, including a great welcoming event centered on Neil Armstrong and two other astronauts (all Purdue graduates), a tour of the large Amelia Earhart (another alumna) collection at the Library along with the astronaut display, a brand-new 24-7 Learning Center facility with every learning amenity we could imagine (110v plugs in each locker for charging electronic devices while taking a break, very comfortable chairs with the writing desk swinging 190 degrees, and state-of-the-art classrooms). We also visited their aeronautics flight training program center, one of the biggest in the nation operated on a university campus. There wasn't much more that could have been done to introduce us to their university and to organize a very fine program of presentations and discussion for the attendees. There was almost immediate fellowship among those attending. Seemed we all "clicked" well!

Session 1. Retiree Association Purposes, Organization and Governance. Melinda Bain and John Trott -Facilitators (see slide handout)

Presenters spoke to three major topics:

1. Why does your association exist?

- Rita Kean asked about university use of retirees to advocate for the university, especially in relation to state legislators, newspaper articles, etc. Those representatives who answered indicated state law restricts who can work with legislators. In the case of Wisconsin, their organization is a 501C-4; therefore, they are not allowed to lobby state legislators. Illinois has an association dedicated to advocating for retiree pensions.

2. Access to Retirees names/addresses

- Most institutions obtain names and addresses of faculty but no other retirees.
- Purdue obtains names & addresses of faculty from its Foundation.
- Northwestern has access to all retirees. Its representative pointed out this may be because it is a private, not a state institution.

3. Leadership & Governance

- Most institutions have Emeriti faculty representation (non-voting members) on Faculty Senate
- Penn State emeriti faculty have representation on the Faculty Senate and serve on the Faculty Senate Benefits Committee.
- Purdue emeriti faculty serve on faculty senate committees which may impact retirees –such as health care, benefits.
- Conversation followed about the number and role of persons that comprise Boards of Directors and the number/activity of committees. Purdue has a very active board and senate committee participation.

Session 2. Retiree Association Finances. Robert Bain, Facilitator (see slide handout)

1. How do we raise and spend money? How do you get University support? How much do retirees donate to their university foundation?

- Purdue reported that the gifts given to the foundation by retiree's averages @\$ 4.5 million per year. Retirees support endowed scholarships. The Purdue Foundation matches funds raised for scholarship endowments. There is a "Day of Giving" where retirees give to the Retirement Scholarship Endowment fund, which has \$50K in endowed funds.
- Purdue Retirees Association has a very close relationship with their Foundation and participate in fund drives both internally and externally. For example, for the United Way Community Fund drive, the University donated \$780,000 of which \$129,000 was from retirees.
- Robert Bain shared that U of California system does a statewide survey of retirees as to their contributions to the foundation, service to the community and university.
- Purdue provides medical supplements for retirees (see Session 3).

2. Newsletters- most Association newsletters are sent electronically. MSU sends one printed copy per year to announce programs; the rest are sent electronically.

Session 3. Marketing Your Retiree's Association and Benefits. Don Gentry, Facilitator (see slide handout).

Major Questions/ Points:

1. How do you get retirees to participate and volunteer?

Suggestions from participants:

- Give retiree cause to contribute to foundation
- Make organization known
- Build community- market while still employed- gear toward organization
- Continuity of leadership among organization
- “Each one reach one” member contacts new member
- Put on HR checklist- Purdue works very closely with Human Resources
- Be more aggressive with University Administration
- Have retirees serve on University committees
- Results of Nebraska’s survey of retiree’s participation and service to the University and community were positively received.

Examples of ways to reach out to retirees:

- Purdue University Liaison- Who is first to contact retirees? Ex. Faculty- Purdue- Research & Development Office.
- Purdue Retiree Board members sit on (non-voting) University Policy Committee, Compensation & Benefits Committee, Parking Committee, University Investment Committee
- Michigan State – webcast their programs to all
- Most institutions have a number of very active interest groups which serve to increase membership

2. Changing Demographics

- Communication methods have changed
- Where retirees live and travel have changed over time
- What benefits are there for me?
- Membership and volunteerism with respect to university associations, churches, service organizations, retired and discharged military organizations seem to be dropping. All Retiree groups are actively recruiting and maintaining members.
- We shared that the UNL Emeriti/Retiree Association President presents at the sessions on retirement hosted by Human Resources, UNOPA and UNAD.

3. Direct Support from University for Retirees

- Purdue provides retirees access to University Wellness Center and Pharmacy (including free flu shots), Libraries, Recreational facilities

4. State Pension Programs (see handout, State Pension Plans Funding Report by Bloomberg, 2015)

- There was discussion of state funded pension programs.

Session 4. Retiree Health Care: A Role for your Retiree Association? Don Gentry, Facilitator (see slide handout Session 4 and slide handout, **Insuring Our Health: What’s New in Health Care and Insurance! What’s Not New?**).

- Number 1 concern of retirees is health care.

- Purdue provides health insurance benefits through joining the retiree's **PURDUE PURCARE Supplemental Medical/Drug Insurance** (see handout for details)
- **Purdue offers documents for ALL retirees on webpage – go to *Benefits/Health Insurance*. For example, there is a **Survivor's Check List, and End of Life Document**. **Organizing My Affairs** document permits one to store all info in one file.**
- **Road to Retirement** is a program offered yearly by PURA and Human Resources (see slide handout *Road to Retirement*)

The 2018 Big Ten Retiree's Association Conference will be held at Penn State University, August 3-5, 2018.

The 2019 Conference will be held at U of Illinois, August 4-6.

UNL will host conference in 2027.

Answers to Questions by Chancellor Green and President Bounds

- **Chancellor Green – Containing the Cost of Education – RK contacted Purdue administrator, Jim Almond, SVP and Assistant Treasurer (as per Ted Wiedman). Waiting to hear back from him.**
- **President Bounds – Advocacy for the University – educating legislators, news articles- state**
 - **Illinois has the State University Retirement System <www.surs.org> which administers benefits, and the State Universities Annuitants Association <www.suaa.org> which is the advocacy group to support and maintain benefits for retirees.**