A MODEST PROPOSAL:

A UNM COLLEGE FOR EMERITI FACULTY & STAFF

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To: UNM Board of Regents
From: Emeriti College Steering Committee, UNM Retirees Association

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EXECUTIVE SUMMARY

Prologue. "*Innovation manifests itself in so many ways and forms – scientific, artistic, social, commercial – and in so many places. I would like to stress that one thing we continue to do more here at UNM is to celebrate innovation everywhere we see it. ....The many people and partnerships it takes to establish and maintain this type of culture is a testament to what can be accomplished by continuously engaging* ***our*** *(emphasis is ours) community in thoughtful and deliberate approaches to developing solutions to our shared challenges.*" President Robert Frank, *Weekly Perspective*, March 10, 2014.

In an environment where the University's status quo is defined by challenged resources, UNM's retired population is a largely untapped repository of experience, institutional knowledge, and wisdom. The University of New Mexico Retirees Association (UNMRA) proposes development of a College for Emeriti Faculty and Staff (hereafter, Emeriti College). This Emeriti College will establish a centralized location and structure to provide transitional support and advocacy for retirees while promoting their continued engagement in the academic and organizational life of the university. The Emeriti College gives official status and structure to this endeavor within the academic environment of the University, and it recognizes retirees for their decades of accomplished service while inviting their future involvement and contributions to the University community and its several missions.

This proposed Emeriti College will be unique in the United States because, while several such colleges in institutions both large and small support emeriti centers, none serve both retired faculty and staff; thus, typical emeriti models ignore the skills and expertise of a large and dedicated population, their retired staff members. We intend for UNM's Emeriti College to engage both retired faculty and staff in furthering the goals of UNM.

The creation of the Emeriti College acknowledges the desire of retirees for a "sense of place" and for support that extends beyond advocacy to providing a meaningful transition from active employee to active retiree status. The intent is to make connections and to engage those individuals enthusiastic about continuing their association with, and contributing their time and skills to, the University.

This new structure would provide retirees with continuing and empathetic support that is currently lacking, despite the resources made available by UNM Human Resources. A meaningful transition would build and maintain connections between the retiree and the institution that currently are a product of serendipity rather than structure. Absent those connections, the retiree is often left with the sense of being discarded, and the University is left without the opportunities and expertise retirees can offer as a valuable and growing resource.

The potential of the Emeriti College reaches as far as a healthy imagination allows. In addition to transitional support for soon-to-be retirees and education/professional development opportunities for current retirees, the College would maintain a number of Centers designed to tap into retirees' experience and institutional knowledge. The University's academic mission would benefit programmatically and financially from teaching, mentorship and organizational

support provided by retired faculty and staff. University advancement goals and the institution's status within the greater New Mexico community would benefit from the enthusiastic advocacy of its retired population. The College would provide the place and structure for these initiatives to thrive.

In order to fulfill its potential, the Emeriti College needs an accessible location, minimal staff, and a modest annual budget. Initial administrative support from the University would eventually be supplemented by a combination of grants, dues, and private contributions. The College is expected to show realistic growth in phases, with expansion dependent upon programmatic success and positive periodic assessments.

Success will be determined by the participation of growing numbers of UNM retirees in the life of the University and their contribution to its academic and financial success. Success will be underscored by University departments using the skills and talents of retirees and acknowledging their contributions to student and institutional success. Success will be celebrated with the eventual but inevitable improvement in the retiree attitude toward the University, when it is acknowledged that emeriti status truly matters.

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1. Introduction

This document proposes that the University of New Mexico (UNM) join with the University of New Mexico Retiree Association (UNMRA) to develop a College for Emeriti Faculty and Staff (aka, Emeriti College throughout) to embrace the valuable resources retirees have to offer UNM in terms of dedication, experience, insight, and wisdom gained regarding how UNM functions and of the contributions they can make in its future direction.

The word *emeritus* (plural, *emeriti*; female, *emerita*) is derived from the Latin words *ē* ("out") and *meritus* ("merited"). Currently designating a retired professor and a mark of distinguished service, the title is also used upon the retirement of any person of distinction in other professions as well, including bishops, presidents, prime ministers and, recently, to one pope (Benedict XVI). Thus, at UNM we wish to extend the distinction to our retired staff who, in tandem with professors, kept the university in operation and assisted professors in their teaching and research activities at every turn. The term *emeritus* does not signify that a person has relinquished all the duties of their former profession; many may want to continue to exercise some of them. Moreover, we believe that currently at UNM emeritus status is but a hollow, symbolic phrase that provides no clearly defined rights, responsibilities or professional opportunities. Here we present our case to redefine *emeritus* as an honorific title acknowledging many years of service; it is a time when our senior colleagues have the opportunity to transition to their new career phase (if they desire), to scale-back participation in their former academic role(s) with more flexibility to choose how they want to stay involved, and to contribute to the academic mission. This becomes the rationale for our proposal.

A. Brief History of the University of New Mexico Retiree Association (UNMRA)

In the spring of 2000, a group of retired faculty and staff began meeting with members of the Staff Council; this *ad hoc* group of retirees included Scott Alley, Anne Brown, L.J. Lovell, Karin Retskin, Mimi Swanson, and Lee Zink. In little more than a decade, since this modest beginning, the UNMRA has evolved from an idea of several forward-thinking enthusiasts to an influential force on the UNM campus. But there is much work yet to be done. An abbreviated version of our complete history ("Cliff Notes") is given in **Appendix A (pp. 24-25).**

B. Preparing to Retire and Retirement: The UNM Experience Today

It is the intent of the UNMRA and its proposed evolution into the Emeriti College to be a constructive force at the University of New Mexico. It is our belief that we can make a significant contribution to improving UNM's campus climate while providing empathetic support to current and future retirees – a benefit they do not currently enjoy.

During our recent membership drives, UNMRA Board members spoke with numerous retired colleagues and the picture that emerges is one of widespread dissatisfaction. One of the reasons for retirees' dissatisfaction includes the lack of availability of professional resources that ultimately would benefit UNM. This lack of office and lab space to continue their scholarly work after retirement is suggestive of a devaluation of retirees' status as scholars by both the administration and their departmental colleagues. Another reason stems from UNM having no

official program to allow one to phase into retirement, as exists at a number of other universities. Yet another is the current lack of opportunities to remain involved after retirement, even though surveys show that about 75% of retired faculty nationally want to stay connected to their institution in some capacity.

Why do feelings of disenfranchisement and unhappiness arise among retirees at UNM and what is their root? The following example highlights, but does not exhaust, the answer. This is the recent experience of one of our colleagues. This person worked at UNM for 29 years, had chaired her department and various national committees, published widely, and is a very organized person; she went to Human Resources (HR) to speak with someone about the necessary steps one takes toward retirement. The result of her experience is that she has never felt so dismissed as with this encounter. With each question she asked, the young person at the counter told her, in an increasingly irritated voice, "It's on the website." Questions she asked seemed reasonable: "When in the spring did she need to notify HR?" "What were the particular steps she needed to accomplish for this momentous decision in her life?" "Was there a general meeting for potential retirees or should she set up an individual session with an HR person?" She received no information from the HR person with whom she spoke. When she went on-line (as instructed), the website information was not helpful because it did not answer her questions. Is this really the best way to treat potential retirees, who invested their professional careers here? Or was this an isolated incident?

One (retired) member of the UNMRA Steering Committee recently "tested the current waters" by posing as a current UNM professor who was considering the possibility of retirement. He went to HR to ask questions similar to those above. What kind of help is now given to employees who are considering retirement? What is the process to complete the retirement paperwork? How much personal, one-on-one help are they willing to give or not? Sadly, his experience was the same: "Go to our web site; all your questions will be answered there." Nothing more.

On a positive note, UNM-HR does provide an "About Retirement" page with computer links via the "Retirement" Tab to several useful things. First, the page links to the ERB site that gives written instructions and the form to fill out to mail to the ERB in order to start the process for receiving an ERB pension. Additionally, the page offers access to the "Classes" Tab where an employee can find three specific classes related to retirement: 1) I Want to Retire NOW; 2) Retirement Manager--How to get Started; and 3) UNM Retirement Process-an overview for those more than one year from retirement. Finally, through Tab access to "Retirement Manager," employees can sign up for a set of forms and instructions that are intended to take care of the entire retirement process with no human intervention.

The University policy manual offers guidelines on how, when, and under what conditions faculty and staff may retire, and HR has on-line checklists and procedure guides for the process. But where is the human, and the humane, contact in the current process? Where is the compassion? Where is the helping hand when it comes time to make this momentous decision after devoting a professional lifetime here? The attitude conveyed, and received, is that the day we turn in our keys and walk out the door, we retirees <u>cease to exist</u>.

We understand all policy and procedure is written for current employees because no business or institution makes personnel policies governing individuals who don't work for them. But universities in general, and UNM in particular, should and can be different. The sense of community is strong while faculty and staff are employed, and we believe a sense of continued membership in this community is an important, appreciated, even necessary part of retirement. The cavalier manner in which UNM dismisses its retiring faculty and staff ignores the opportunities that should be available to those who have devoted their careers to UNM and in the enormous resource of experience, knowledge, and wisdom retirees' carry with them. Both UNM and its retirees stand to gain substantially from changing the current paradigm. Formally recognizing retirees as a valued cohort within this community is a win-win choice for everyone. This is a culture we can, and must, change and this change only can occur if we work together. It is important to our University and to our retirees to make the emeritus status meaningful.

C. Retirement Demographics and Emeriti Colleges and Organizations Nationally

Demographic trends for faculty (e.g., U.S. Census Bureau, TIAA-CREF) show that in 2010, about one-third of the nation's full-time faculty members were 55 and older, compared to about 25% a decade ago (Anderson & Brown, 2012). In 2011, one of the most influential associations in higher education, the American Council on Education (ACE), convened a meeting of 50 universities to discuss "how to support soon-to-retire faculty members and help them maintain meaningful connections to the institutions where they built their careers." The ACE report signaled the growing interest in the later stages of academic life, both before and after retirement. This interest is a reflection of the sheer numbers of academics "collecting at the exit door" (Baldwin & Zeig, 2012). This 2012 report also noted that at some institutions, nearly one-third of their professorate are 60 or older. Finally, Baldwin & Zeig (2012) conducted a web-based nationwide search for emeriti and retired-faculty/staff organizations. Their study found 180 organizations designed to support retirees in higher education. These associations shared four common purposes: 1) to offer retired faculty continued opportunities for learning; 2) to maintain emeriti faculty's social connections and their ties to their institutions; 3) to support their continued academic engagement and scholarly productivity; and 4) to provide retirees the opportunities for service to the university, community, or larger society.

All data point to an increased trend toward later retirement that has resulted in a growing number of older faculty continuing to be productive, whether they work full-time or become part of the much larger proportion moving on to retirement status. Members of this group of retirees are more motivated than in the past to continue in their trained professional and productive lives or to explore new directions via vastly increased informational resources. However, whether these individuals retire or not depends on what they see waiting for them on the other side. Many desire to continue an intellectual life, a connection with their institutions and colleagues, and work with students. Technological advances enabled them to remain productively engaged in teaching, scholarship, and institutional affairs even when they no longer come to campus daily or even live in the same city, state or region of the country (Baldwin & Zeig, 2012). Thus, accumulating data suggest that institutions substantially benefit by making emeriti status more attractive in that the schools can maintain their best, long-standing programs by attracting the flow of new talent into their institutions as these positions become available (Ehrenberg et al.,

2001). The benefits to any university of the ready availability of their retirees, who can hold a real allegiance to the institution if properly motivated, are substantial.

Emeriti colleges are firmly established at a growing number of the North American universities both small (e.g., Winona State, Emory) and large (e.g., Arizona State, UC- Berkeley, University of Toronto). The national umbrella group for these organizations is the Association of Retiree Organizations in Higher Education (AROHE; www.arohe.org). In 2010-2012, AROHE conducted a "Survey of College and University Retiree Organizations," and learned that almost 95% of colleges and universities surveyed had some type of retiree organization; 31 of 115 (27%) had an Emeriti College, Scholars Academy, or university-sponsored offices or centers. The UNMRA surveyed the 20 universities on-line that have the most visible and stable emeriti colleges (**Table 1, p. 22**). They differ in name and structural detail, but they all share basic principles relating directly to the rationale for their existence: they are in place to support the culminating stages of their retirees' careers. Not all programs have every opportunity their retirees might desire, but in this document we list practices that we anticipate UNM will consider implementing.

When we examined the differences of programs and activities between "non-centers" (e.g., retiree organizations) and "centers" (e.g., emeriti/retiree college/centers) we found substantial differences between them across a wide variety of functions or programs (**Table 2, p. 23**). A much higher percentage of centers than non-centers are oriented toward the purposes of both service and teaching, whereas non-centers are more likely to see advocacy for retirees as their main purpose. Whatever immediate motivation lies behind these comparisons, the overall profile of centers includes major commitments to engagement with the university community and, to some extent, the communities served by the institutions. In addition to benefiting the institution, such centers help retirees maintain and expand their experiences and knowledge. Indirectly, this contribution to lifelong learning contributes to the human and intellectual capital of the retirees and, consequently, to their value to the institutions.

Our proposal is based upon the uniqueness of the retired UNM professoriate and staff and the changes in that body anticipated over the next several years. The question is: Can we capitalize on that uniqueness in formulating a plan that will optimally and mutually benefit the University, retirees, and the larger New Mexico community? As an initial approach to answering this pivotal question, we examined some regional and national organizations, and we studied both the AROHE and Baldwin & Zeig (2012) university surveys to analyze what trends characterize the actions of other universities. We also looked for concerns not currently being met that might contribute to the general welfare of both UNM and UNM retiree populations. We looked particularly at activities that complement the growing "outward perspective" developing at most progressive universities, not the least of which is to initiate an Information Center on emeriti expertise and activities to be kept by the office of the proposed Emeriti College. Most of the 20 schools we studied on-line (**Table 1, p. 22**) could be considered UNM peer institutions, some are universities we try to emulate, and a few are included because they have initiated very progressive retiree centers and programs (e.g., Emory, Indiana).

Generalizations gleaned from our study include: 1) Most (> 80 to 95%) universities have some form of retired faculty/staff organization; 2) Establishment of emeriti associations, centers,

or colleges usually comes from one of two sources—grassroots or administration—with the associations arising from the effort of retirees while the centers/colleges being initiated by the college or university administration; 3) Historically, emeriti associations have involved retirees in social activities and/or secured and protected benefits of retirees (some of these latter issues are now part of university policies); 4) A university that commits to an emeriti center or college fosters and supports the continued scholarly, creative, and artistic lives of its members; in so doing, it will prolong the continued fruitful engagement of the individual emeriti members with the institution; 5) Increasingly, institutions recognize that getting retirees *back* onto campus is the critical step in strengthening emeriti participation in university governance and the continued benefits to both the institution and the retired individual are clear and substantial.

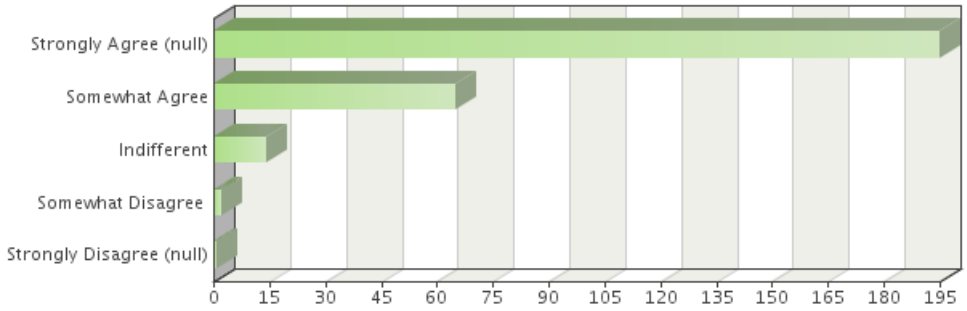
Among the most important benefits of an Emeriti College to its members is the sense of "place." More than just a physical location, a place to congregate brings immense psychological value to those who are defined in large measure by what they do and where and with whom they do it. For most emeriti individuals, retirement does not alter one's essential being. "Place" is where you can go to continue receiving the stimulation that is essential to self-esteem and the satisfaction of work well done. An Emeriti College is such a "place" and brings together the invaluable resources of expertise, experience, wisdom, and will for the mutual benefit of the institution and each individual retiree.

We have established that there are models and precedents for emeriti organizations similar to the one we propose. Some of these offer excellent organizational and programmatic suggestions, the emulating of which would be of benefit to UNM. In addition, we are committed to the concept that establishment of an Emeriti College at UNM also is charged with the responsibility of being a leader in this field. We believe that by the establishment of an Emeriti College, UNM would further distinguish itself and join the ranks of forward-thinking and leading universities in the country.

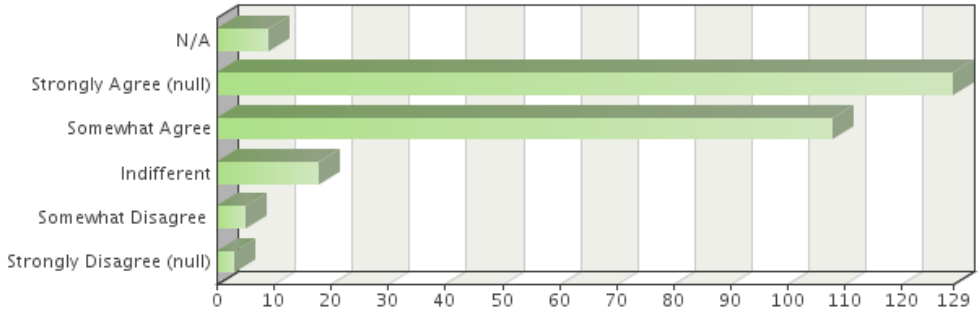
During February, 2014, UNMRA made a survey available to the faculty, staff, and retirees of the UNM in an attempt to determine whether there was interest in creating a "College for Emeriti Faculty and Staff" at UNM. A copy of the survey is attached in **Appendix B (pp. 26-28).** As of February 28, 2014, 278 responses to our survey were received. The results of the survey are summarized below.

The first twelve (12) questions regard what functions the Emeriti College should address. The responses overwhelmingly endorsed all of the functions presented, with the "strongly agree" and "somewhat agree" categories garnishing between 94% and 80%. Some additional suggestions included, "…it could be a place where faculty retirees get access to opportunities/projects nationally and globally, not just at the University," and "…referral resources for needs of retirees".

In answer to question 1, "A function of an Emeriti/Retiree Center should be to enhance the interaction between retirees and the University," over 94% strongly or somewhat agreed.



In answer to question 14, "I would likely affiliate myself with an Emeriti/Retiree Center if it provided functions, activities and service of interest to me," 87% strongly or somewhat agreed.



A majority (69%) of the respondents are currently involved in academic or service activities at UNM. The activities engaged in include advisory capacity, part-time work, various campus committees, as well as faculty and staff positions for those not yet retired.

Interestingly, 29% of the respondents have not yet retired from UNM. Their responses indicate a considerable interest in a College for Emeriti Faculty and Staff by those who will be retiring and want to continue being involved in the University. The majority of responding retirees retired between 2000 and 2013, the earliest retirement date was 1986. Of the responders, 35% were staff members which indicates an interest for creating a combined faculty and staff organization. The survey participants come from all areas of the UNM workplace, and had an average of 22 years of service.

The general conclusion that we draw from our survey information is that a strong desire exists for creating a UNM College for Emeriti Faculty and Staff.

In keeping with UNM values of commitment, empathy, integrity, intellectual curiosity, and respect, we recommend that the University of New Mexico Board of Regents recognize these needs and benefits by founding the College for Emeriti Faculty and Staff.

The remainder of this proposal contains four sections. **Section 2,** examines why universities/colleges are more interested in developing closer working relationships with retirees and provides specific benefits of an Emeriti College to individual emeriti faculty and staff, to UNM, and to the greater New Mexico community. **Section 3** contains our central recommendations regarding the structure and policies of an Emeriti College, including membership criteria, administrative structure, physical facilities, and potential and real revenue

sources. **Section 4** proposes the establishment of Centers, rather than departments, as the basic units of focus within our Emeriti College. The proposed Emeriti College is specified here in sufficient detail to permit its establishment in a minimal time period, but with enough remaining unspecified details to allow our College to evolve flexibly under the guidance and creativity of those who would direct its future course. **Section 5** offers our conclusions.

2. Interest in Emeriti Colleges and Benefits That Can Accrue For All Participants

A. Principal Functions and Interests in a UNM Emeriti College.

An Emeriti College will give a home and a focus to continued intellectual, creative, and social engagement of retired faculty and staff with, and within, UNM, and it will serve its emeriti members, the University, and the community as a clearinghouse for resources made available by both the membership and the University. It will provide an organizational base for official University ties and emeriti policy development, fostering consistency in these policies throughout the academic units of the University. It will provide and sponsor a number of opportunities for public service and for the intellectual growth of its members and their spouses or domestic partners. Here we offer a short list of principal functions, which are detailed later for the various participants/beneficiaries:

- Enhance interaction between emeriti faculty and staff and the University;
- Facilitate retirees' fund-raising support of UNM;
- Provide opportunities for retirees to support ongoing research, teaching, artistic endeavors, and service missions of the University;
- Serve as an agency through which UNM could extend its intellectual reach and penetration into issues of global, national, state, and/or community concern;
- Integrate all retirees into the life of the University, if they so desire;
- Provide expert service, wisdom, and knowledge gained via years of experience;
- Encourage camaraderie through sponsorship of a variety of social activities;
- Promote lifelong scholarship and learning among its retirees;
- Facilitate the availability of scholars who wish to share their knowledge with UNM and the larger Albuquerque and New Mexico communities;
- Assist and work for retirees to retain the rights and privileges granted upon their retirement;
- Connect faculty and staff retirees and UNM units needing part-time and/or short-term help (paid or volunteer);
- Serve and inform the UNM administration in an advisory capacity on retiree issues, activities, and needs;
- Provide information and/or referrals to retirees on issues like health services, long-term care insurance, taxes, estate and financial planning, retirement housing, etc.

B. Potential Benefits to UNM

- Teaching resources for "filling in" created by illness, sabbaticals, or budgetary shortfalls. Here we envision that the Emeriti College will work with the administration to develop policies and protocols governing the *pro bono* and pay-for-services rendered by various emeriti individuals;
- Participating in special roles within University partnerships with public schools and other community and government institutions;
- Providing institutional memory of our alumni to assist the UNM Foundation fund-raisers in their contacts with potential donors;
- Archiving and collecting: many retired faculty have left behind collections in which they have invested entire professional lives, but which can lose value if they do not continue to receive expert attention. Departments often cannot afford to immediately acquire new personnel to maintain their historical information about retirees, including videotaped biographical and/or exit interviews;
- Providing a ready source of instructors for Continuing Education courses;
- Working with HR to provide pre-retirement informational programs for UNM faculty and staff to include retirement prep classes, *Steps to Retirement* brochures, etc.;
- Continued association with productive scientists, scholars, and artists who have retired from their faculty and staff positions but not from their disciplines, and who have developed over their career a lifetime loyalty to the University and to academic values;
- Mentoring of junior faculty and staff, an important aspect of retention, enhanced by the participation of experienced and active retired faculty;
- Mentoring and advising students;
- Mentoring soon-to-retire faculty/staff; we call attention to *mentorship training*: mentoring is usually the first thing mentioned when potential activities for emeriti faculty and staff arises, but evidence prevails that mentoring without proper training is mostly counterproductive. Thus, developing a cadre of well-trained, caring emeriti mentors focused on specific projects could be a very powerful resource;
- Collaborating with the Honors College, various departmental honors' programs (e.g., advisement of Senior Theses), and other colleges to continue service, where appropriate, as members of M.S. and Ph.D. committees;
- Offering freshman seminars and other elective courses at all levels, for which full-time faculty are or may not be budgeted;
- Serving on university boards and committees to support institutional activities (e.g., 125 year Anniversary celebration);
- Serving as department historians. Resources to produce accurate histories of the many and sometimes undocumented contributions are seldom available to departments; emeriti faculty and staff are uniquely qualified to do this work;
- Working with HR and other campus units to explore ways by which retirees can enrich and contribute to campus life and better serve as advocates for UNM and its mission.

C. Potential Benefits to the Community

- As ambassadors for UNM, retirees are the face of the University when they are involved in a myriad of community partnerships (e.g., neighborhood associations, County Audit Committee, city government, volunteer fire fighting, EMT services, etc.);
- Public lecture or performance series from world renowned experts and artists who now can take time to broaden the scope of their speaking or performing in response to community interests;
- An organized source of expert consultant resources for both public and private institutions (e.g., volunteers to help with special projects in classrooms; with presentations in some classes; as potential docents in APS, libraries, museums, etc.);

D. Potential Benefits to Individual Retirees

- Offer opportunities to lecture, teach, or perform. Retiring faculty often admit the prospect of no longer teaching is bittersweet because they see teaching as a way to maintain intellectual keenness and they miss the contact with bright minds, young or old;
- Formalizing opportunities for involvement, such as service on college/university committees and on graduate committees in their areas of expertise;
- Participating in community service activities, under the auspices of UNM, and providing an organizational structure under which to operate, such as contributing to UNM partnerships with schools, business, and/or industry;
- Pursuing UNM sponsorship of grant proposals for research or performance activities after retirement and/or transition grants to faculty to complete specific projects before retirement;
- Presenting lecture series and other regularly scheduled activities in which they may participate either as a presenter or as audience members;
- Providing a venue for emeriti publications;
- Combat the isolation many retirees feel by being able to offer encouragement <u>and</u> opportunities;
- Sponsoring classes and organized tours for retirees and their partners;
- Providing up-to-date information on social, political, and financial issues of interest to retirees;
- Staffing, administering, and directing the College by retired faculty and staff;
- Opening up post-retirement opportunities available both on campus and within the community;
- Offering discounted on-campus health services (vision, hearing clinics) by interfacing with campus Health Center and HR;
- Offering affordable computer hardware, software, and maintenance;
- Annually dedicating funds (Provost's or President's office) to support the Emeriti College.

3. Proposed Emeriti College Structure and Organization

We propose an administrative structure and organization for an Emeriti College that will ensure a sound basis for its operation and for meeting its goals while providing sufficient initial

flexibility to allow growth to occur along opportunistic lines. We also propose adequate physical and financial resources to permit our new college/center to function as soon as it is established.

A. Emeriti College Membership Criteria

The scholarly and creative abilities and work ethic possessed by UNM's emeriti faculty and staff have been amply demonstrated throughout their careers. Thus, our assumption is that an expression of interest in being affiliated with a new Emeriti College is accompanied by knowledge and skills with which to deliver mutual benefit. Consequently, membership in the new Emeriti College should be open to all who have something to bring to it or who have something they can take from it; in the immediate future, membership will follow the criteria in the current by-laws of membership in the UNMRA. That is, all retired faculty and staff employees of UNM, including branch campuses, foundations, and other affiliated organizations of the University, are members of the new College. Any spouse, partner, widow or widower of any retired UNM employee may become a member of the College by formally applying. Any currently employed UNM faculty or staff member eligible for retirement or within one year of eligibility for retirement may become a member by applying to the membership committee. Any retiree from a four-year institution of higher education may also apply for membership (see below for further information). Any person who currently qualifies as a member of the UNMRA, and who does not wish to participate in the new College, may relinquish all rights, responsibilities, and privileges by contacting the UNMRA office and requesting to be removed from its membership database.

A large retirement population of state and federal employees remains in the Albuquerque-Santa Fe-Los Alamos Metroplex; additionally, many retired faculty and staff from colleges and universities throughout the nation and, indeed, the world move here. We anticipate that some within this cohort will have an interest in participating in our Emeriti College. We believe these participants would be of significant benefit to the University, its various colleges, and their departments. Keeping in mind that not all institutions have the same levels of programs and expectations for their faculties, we recognize the necessity of a quality-based screening for such applicants. We recommend that retired faculty from other 4-year colleges and universities, upon application, may be admitted as Adjunct Emeriti Faculty in our Emeriti College, provided they are recognized by their respective institutions by the emeriti rank and that their professional records indicate the likelihood that they would have attained tenure had they been faculty members at UNM. Retired staff from such institutions will be recognized by the tenure and accomplishments evident in their resumes'. When we refer to the 2010-2012 AROHE Survey we find that about 40% of centers, but only 23% of non-centers, allowed retirees from another university to become members. The UNMRA already has as part of its constitution that retirees from other institutions can become members of our organization and we would continue such welcome in our Emeriti College. Such policies benefit both the retirees and the institution by adding to the human and intellectual capital that can be used to enhance both retirees and UNM.

B. Administrative Structure

We propose that the Emeriti College be an official academic unit within the

University with all the appropriate benefits, distinctions, and obligations that accompany such a designation. This College would differ from others in that it would admit no students, sponsor no curricula, award no degrees, have no annual performance or merit review reports, nor be part of any college accreditation review process. Rather, it would be supportive of all of these and other aspects of the University, and its several other functions argue that it have official status, with an administrative leader with the rank and title of Dean. We suggest that the Dean of the Emeriti College be selected from the ranks of UNM emeriti members of the current UNMRA, that he/she be appointed with a 49% full-time equivalent (0.49% FTE) contract, and that compensation be determined by agreement between the Dean and the UNM Provost. A proposed budget for Year 1 is in **Appendix D (p. 31**). The Dean would serve, as is the case for all deans, at the pleasure of the University's Provost.

To assist the Dean with the day-to-day function of the Emeriti College, we propose a staff consisting of a full-time Administrative Assistant and one full-time Clerical Assistant/Receptionist. The Dean of the Emeriti College should seek and receive advice and counsel systematically from a group of emeriti faculty and staff; our proposal is that the current Board of the UNMRA can serve in this capacity as his/her Advisory Council, under current UNMRA by-laws. Once the College has begun to function, additions and/or deletions to the by-laws can be adopted, as needed, during the first year of its existence; for example, new by-laws might outline the various Centers and dictate selection of the Directors of the various Centers (**Section 4**, below) as members of the Dean's Advisory Council. This Advisory Council would, in addition to regular advisement of the Dean, review applications for membership in the Emeriti College and proposals for use of its resources.

C. Physical facilities

When UNM creates a credible Emeriti College, a physical home for the College is essential. To be included among the Emeriti College's physical facilities (**Appendix C, pp. 29-30)**, we recommend at least the following as an initial commitment:

- The Emeriti College <u>must</u> be housed in an accessible, easy-to-find location. If not in a stand-alone building, it should be located near the entrance of its building on the first floor. Convenient and readily available parking is essential because some/many retirees face mobility impairments that limit their ability to walk or navigate long distances;
- An administrative office suite with offices for the Dean (210 ft^2) and the Administrative Assistant (133 ft^2). The Clerical Assistant would have a desk in the reception area at the entrance to the College;
- A conference room (179 ft^2) for Board and various other meetings;
- A lounge or day room (209 ft^2) to include a kitchenette (sink, microwave, refrigerator, and floor-to-ceiling storage and cupboards);
- A suite of open, flexible-use space (439 ft^2) work carrels, equipped with computers and broadband access, available to emeriti members on an as-needed basis. The space must be large enough to construct four to six (4-6) such carrels each ~64 ft^2;
- At least 2 closed office spaces (each 130 ft^2), equipped with computers and broad-band access, available for extended use by Emeriti College members on a competitive basis;

- A small storage room (173 ft^2) for College archives, A/V equipment, office supplies, etc.;
- Classroom space for meetings and seminars. We suggest two (2) classrooms (each 382 ft^2) to seat ~ 20-25 students comfortably;
- Mentoring Center Space for five (5) "Centers" cubicles. We suggest two (2) separate rooms, one to accommodate three (3) Centers (570 ft^2) and the second to accommodate two (2) Centers (297 ft^2);
- Small library (414 ft^2) to archive various materials, histories and appropriate documents and discs;
- Either dedicated restrooms (not shown in Center floor plan, **Appendix C** (**pp. 29-30**) or shared restrooms adjacent to our space; restrooms should be handicapped-accessible;
- The Total Proposed Space is 4,730.25 ft^2 (79.5 ft x 59.5 ft), of which 3,631 ft^2 is functional space comprising 13 rooms. Schematics are shown in **Appendix C (pp. 29-30)**, but as our College matures and evolves, more space may be needed.

D. Ways & Means

The basic financing of the Emeriti College will rely on UNM's budget appropriations, an investment entirely appropriate and long overdue. This appropriation is justified by the case that the Emeriti College will serve the University's mission in a valuable capacity. A budget for Year 1 in the Emeriti College is proposed in **Appendix D (p. 31)**. A principal responsibility of the Emeriti College Dean will be to work with the UNM Foundation and Development Office to seek gifts to support our new College's activities and to create such a Fund and solicit donations to bolster it.

Another source of income for the Emeriti College will be membership dues. The Steering Committee believes that an annual expression of earnestness in one's membership in the Emeriti College as expressed by modest dues would be of value. We propose annual dues in line with the current dues structure of UNMRA. We also foresee opportunities for Emeriti College members to seek external funding, governmental (state, federal), and private, to support, under the aegis of the Emeriti College, specific activities and projects as individuals and/or as Centers in our Emeriti College (**Section 4**, below). We recommend that such external funding be vigorously pursued and that overhead generated (if any) be used as it is for the rest of the university, on a proportional basis. This way we support both UNM and the Emeriti College.

Initially, we will need to rely on the UNM budgeting process for seed money and we will need to work closely with Provost Abdallah in setting priorities for recurring (**Appendix D, p. 31**) *vs.* capital (**Appendix E, p. 32**) budgets.

4. Centers within the Emeriti College

As stated, the Emeriti College will differ from other colleges within UNM in many ways, the most visible being the absence of curricula, classes, degrees awarded, and a student body. It also will be universal in its representation of disciplines; that is, members from virtually every academic and service department/unit within UNM. Thus, it is not reasonable to organize the Emeriti College into departments. Instead, we propose a "Center" approach, which has worked

effectively to bring together faculty and staff from several disciplines into a unit with a mission-oriented vision. The Emeriti College "Centers" will encourage a range and variety of possible emeriti faculty and staff interests and projects. However, individual activity need not be associated with any particular Center when a member independently pursues his/her own interests under the umbrella of the Emeriti College. Or, a member of the Emeriti College could choose to be active in one or more of the Centers at the same time. Center Directors would come from the ranks of Emeriti College members and normally would be volunteers, appointed by the Emeriti College Dean, and they would serve on the Emeriti College Dean's Advisory Council. We recognize one principal deterrent will be the difficulty of finding Center directors, who will be committed over the long term to their respective Centers' missions.

The following are examples of Centers that members of the UNMRA Steering Committee believe would attract activity within the new Emeriti College; they could well prove viable and prosper. However, the Centers that eventually mature and grow will reflect the levels of interest among the Emeriti College membership, as well as issues that come to the fore in dialogue between the Emeriti College and the larger UNM community.

A. The Center for Mentoring

Among the most significant values of the Emeriti College to UNM is its potential to provide experienced, well-trained mentors for both active and retired faculty and staff. As we evolve in this role, we will need to carefully define our niche and to compliment, not compete with, other UNM mentoring programs. The Center for Mentoring could assume the manifold tasks of being a (mentoring) agency matching buyer and seller, a training center for mentors (including active faculty and staff who wish to improve their skills in this area), and a facilitator of research in academic mentoring. An important dimension of this Center's mission will be the mentoring of underrepresented faculty members for retention, career success, and eventual retirement advisement. The Mentoring Center will operate from a cluster of office cubicles that will be open at announced periods of time for walk-in activity, but most of the mentoring will be initiated by appointment. The Center can be administered by a Director whose services will be voluntary. Remuneration of Center members would be possible to the extent that external or institutional funding is generated for mentoring activities and research.

B. The Center for Innovation in Teaching and Learning

Throughout lengthy careers in teaching, many emeriti faculty have generated ideas for more effective instruction which, for several reasons, they were unable to test or implement. In retirement, many emeriti find these reasons no longer exist and we believe a number of retirees could provide a valuable service of innovation that can be used by others. With appropriate opportunities and institutional support, emeriti professor now may experiment more freely and creatively with these ideas. This Center would foster creativity in teaching by hosting sponsored projects, seminars, and conferences. Of particular interest to some emeriti faculty (and perhaps staff in some subject areas) is the internet revolution in instruction. The Center, in cooperation with the University, could provide facilities and equipment for experimentation in this area, especially with nonstandard courses. The Center for Innovation in Teaching and Learning would work closely with the Office of Support for Effective Teaching (OSET) and with New Mexico

and Extended Learning (NMEL) in these endeavors. In addition, this Center could provide mentors to active faculty who are designing new courses, teaching in new formats, or wanting to improve some aspect of instruction. Again, this activity would be in cooperation with OSET and NMEL and would allow those programs to offer additional services without adding personnel.

C. The Center for UNM History, Tradition, and Intellectual Property

Few academic departments, colleges, centers, units, or museums within UNM have had their histories compiled and written by individuals who have experienced first-hand, most of the unit's existence. To provide the wherewithal to write these documents by the individuals most suited for the task is an opportunity UNM will no longer have, as various units continue to grow and age and as their original faculties have long passed away. As UNM continues to evolve into a modern multi-campus university, it will become increasingly difficult for UMM to remember and honor its roots. The Center for UNM History, Tradition, and Intellectual Property will seek external funding to support, with honoraria and technical assistance, those emeriti individuals who would be attracted by this opportunity to chronicle the early years of their respective departments, colleges, centers or museums.

In addition to archiving unit histories, this Center would participate in one of the growing stories nationwide for institutions of higher learning: archiving the biographical records and intellectual properties of both its active and retired personnel. Such items as notebooks, diaries, publications of every sort, including music, artwork, and personal histories/memoirs that chronicle contributions of an individual's life history in their unit can become important historical documents that show individual leadership and decision-making that contributed to important changes in direction, focus and excellence in that unit. Finally, the Center will produce an annual survey of the academic accomplishments of retired scholars, a piece of historical information that often goes unreported and unnoticed, even though these scholarly contributions continue to bring credit and prestige to UNM. Certainly their academic contributions are both their own reward and UNM's as these instinctively altruistic individuals have capitalized on longevity by adding major final phases to their careers. This Center will showcase the contributions of UNM faculty and staff leaders throughout our history.

The Center will work collaboratively with the College of University Libraries and Learning Sciences (CUL&LS) on many of these endeavors. Retirees will work with the CUL&LS archivists on these projects. These archives can be added to the University Libraries' collections and accessed through the library's catalog. As may be appropriate, rare materials will receive proper care, handling, and housing; some items could be digitized for wider distribution. Retirees would contribute materials, time, and coordination to enhance the library's current collections related to the history of UNM and to add new collections. The CUL&LS can provide expertise and training in collection of archival materials and in producing elements of these archives such as oral histories.

D. The Center for Retiree Research and Publications

Publication venues become a problem to many individuals when they reach emeriti status and no longer have access to institutional funds for publication costs or to clerical staff for

production assistance. We envision this Center, staffed by volunteers, could assist retired scholars in having their work published. One possible mechanism could be to establish a strong liaison with the UNM Press to explore avenues that can be mutually beneficial. This Center also would provide electronic publishing capabilities, including word processing facilities and, to begin with, voluntary expertise. Publications—articles, monographs, books—would be stored in electronic media until hard copies for distribution were desired/requested. Final production of hard copies could be contracted to local photocopying outlets or to the UNM Press if it can provide such support. The Center might also be able to assist authors in locating financial support for hard copy production. Before being published all documents would be subject to a reviewing process to ensure the quality and standards required by any major academic publisher. The Center for Retiree Research and Publications also would stand ready to assist emeriti scholars in finding funds for the payment of page charges in professional journals.

E. The Center for Retired Staff Programs

Many retired staff members retain a strong interest in both the University and in maintaining contact with the people they worked with during their years of employment. For example, the majority of retirees who continue to work at UNM, under the Return to Work Program ($15,000 or 0.25 FTE Rule), are staff (159 *vs.* 142 faculty). Retired staff fill positions temporarily or on a contracted, part-time basis as needed by departments. These working retirees contribute their expertise and experience to UNM, often for compensation at the rate of entry-level personnel, or lower, which is insulting and unprofessional. Although the Return to Work option is mentioned in Administrative Policies 3625 (Section 4.2) and Policy 3210 (Section 5.3), there is little official recognition or support for this group of retirees. Working emeriti staff members sometimes have office space in which to do their work, but it is more likely shared space. Working retirees would benefit immediately from the services and space provided by the Emeriti College.

Many retired staff relish the opportunity to return occasionally to the workforce for brief periods. The Center for Retired Staff Programs would initiate, support, and coordinate programs connecting staff retirees with UNM units needing part-time or short-term help due to regular employee illness or authorized leave, to schedule classes and organize tours for all retirees and their partners, to keep retirees informed on social, political, and financial issues of interest to retirees, and to provide information and/or referrals to retirees on issues such as health services, long term care insurance, taxes, estate and financial planning, retirement housing, etc. As the program develops, many other functions that will enhance the relationship between the University and its retirees will certainly arise.

5. Conclusions

If we look at the overall, increasingly important retirement issue, we note that decades ago when opportunities were provided by organizations, a large proportion of their individuals took advantage of the opportunity, remained engaged, and continued “both instrumental and socio-emotional patterns” that existed prior to their retirement (Roman & Taietz, 1967). Thus, we argue that providing faculty and staff who either are retired, or about to retire, with

opportunities for learning, meaningful engagements (i.e., as teachers, scholars, consultants, experts), a continued sense of belonging, intergenerational mentoring opportunities, and more, UNM can make retirement more meaningful for those who have crossed the threshold and can help make retirement more appealing for faculty and staff who may be reluctant to relinquish their professional identities. In turn, attractive retirement facilitates the continued flow of desperately-needed talent into UNM.

The information and data reported here offer a compelling case for "making emeriti status matter," especially in a state, and at a time, of restricted resources. Healthy, productive professors and staff deserve the opportunity to continue learning and serving, even while they make way for new colleagues to enter the profession. UNM can only benefit from the teaching, mentoring, and many forms of service their retirees can continue to provide. Establishment of an Emeriti College is a feasible, viable option for UNM and, when established, it will be successful in enhancing retirees' integration with the mission of our University. Thus, we both agree with, and endorse, the statement of Diamond and Allshouse (2007) who said, "In most university and college communities there is a growing pool of talented retired or transitioning individuals who would like nothing more than to make a difference by using their knowledge and experience to improve their communities and institutions while continuing the process of their own personal development."

The progressive emergence and establishment of Emeriti Colleges and Centers from retiree organizations nationwide is noteworthy because it suggests the importance of physical space at the institution and commitment of resources from the institutions (Baldwin & Zeig, 2012). Such centers are much more likely than are non-centers to include both teaching and service to both communities and institutions. In contrast, non-centers are clubs and associations that have typically formed and become organized by the retirees for their own advocacy as their sole or main purpose. These results clearly suggest the principal that "centers" are more likely than non-centers to be oriented toward use of retiree resources for the main purposes of the institution, namely teaching and service (see **Table 2, p. 23**).

The rapid growth in university retirements, longer life expectancies, and extended retirement years of university employees, the under-utilized professional skills and interests of retirees, and the financial and human capital challenges of universities strongly argue for integrating retirees into the mission of their higher education institutions. Such integration contributes substantially in community service and engagement, and helps retirees themselves to live more resilient lives. These goals all are needed for retirees to flourish in a rapidly changing world and for higher education to use their vast human, <u>especially intellectual</u>, capital in their established areas of expertise, as well as in new arenas; thus, many emeriti college activities are directed at maintaining the skills and expanded experiences of the retirees themselves. This contribution to lifelong learning adds to the human and intellectual capital of the retirees as well as to their value to the institutions they have served and continue to serve.

An Emeriti College provides the most evolved and effective organizational mechanism to facilitate the goals of more fully advancing faculty as effective resources and integrating their roles within the institution. An Emeriti College at UNM can assist in bringing retiree resources—human, social, intellectual—to bear upon the mission of our University to achieve even further

excellence in teaching, service, and research. Given that those in later life excel in experience, perspective, and wisdom, the accomplishments of retiree organizations in improving the attachments between the institution and its retirees can be potentially and authentically significant. The future vitality of the academic profession and the higher education enterprise will depend in part on how well we treat faculty members who have served their institutions for many years and still have much to contribute (Baldwin & Zeig, 2012). We at UNM have an opportunity to take a leadership role in building an Emeriti College that could be among the best in North America.

UNM is celebrating its 125th birthday this year and President Frank has stated that we should have a forward-looking state of mind intent upon reaching ”transformative goals,” including making UNM a destination university. An Emeriti College at UNM could be one of those goals that can be easily reached with minimal investment of capital. The College would certainly make UNM a destination university for its retired faculty and staff. This fact would be good for the University and it would be good for New Mexico.

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Table 1. Selected institutions of higher learning (20), that might be considered UNM-peer institutions, with Emeriti Colleges or Centers now in place (year begun, if known).

Arizona State University—Emeritus College (1991, 2004)[1]
Boston College—Association of Retired Faculty
Clemson University—Emeritus College (2003)
Cornell University—Encore Cornell
Emory University—Emeritus College (2001)
Indiana University—Emeriti House (2003)
State University of New York (SUNY) at Binghamton—Retiree Services
SUNY at Albany—Emeritus Center
SUNY at Buffalo—Emeritus Center
University of California (UC) Berkeley—Emeritus Center (1999)
UC Davis—Retiree Center (2006)
UC Irvine—Center for Emeriti & Retirees (1994)
UCLA—Emeriti/Retirees Relations Center (1967, 1992)[1]
University of Colorado—Boulder (1995)
University of Missouri—Emeritus College
University of Southern California—Emeriti Center (1949, 1978)
University of Toronto—Academic Retiree Center
Wesleyan University—Wasch Center for Retired Faculty (2005)
Winona State University—WSU Retiree Center (2005)
Yale University—Henry Koener Center for Emeritus Faculty (1999)

[1] When 2 years appear in parentheses, the first is the year that a retiree organization was first formed, the second is the year a college/center was proposed and/or begun.

Table 2. Programs & Activities of Retiree Organizations *vs.* Emeriti Colleges/Centers[1].

Groups Served by Activity/Programs(s)	**Non-Centers (%) (N = 80)**	**Centers (%) (N = 26)**
Retirees		
Maintain retiree e-mail listserv	76	86
Host retiree recognition day, reception, similar event	34	71
Maintain retiree contact records	64	71
Host social events: breakfasts, lunches, other	86	68
Offer pre-retiree retirement education workshops	24	43
Offer wellness, health, aging programs	24	43
Offer computer classes for retirees	13	32
Offer retiree awards	24	32
Teach retiree courses and workshops	11	32
Develop memorials for recently deceased retirees	19	29
Offer retiree re-employment opportunities	4	18
Provide guidance to newly retired employees	41	57
University		
Offer programs with volunteerism, civic engagement, community outreach, etc.	15	57
Promote cultural and artistic endeavors	28	57
Provide assistance requested by the administration	46	57
Preserve/write university &/or retiree organizational history	28	50
Publish/write profiles of distinguished professors, staff, administrators	9	21
Teach undergraduate seminars, orientations	4	18
Teach graduate classes	6	11
Mentor new faculty	1	14
Raise funds for retiree lectures, programs, awards	10	29
Provide scholarships for students	34	11
Allow affiliates from other universities to be members	23	40
Community		
Present community lectures, discussions, performances	31	46
Offer retiree exhibits of creative works: art, photography	15	39
Provide volunteers for community educational and other outreach programs	13	39

[1]Adopted from: Anderson, R. & J. Brown. 2012. Differences between Centers and non-Centers among retiree organizations in Higher Education in North America, 2012. Report on data from a survey of 106 institutions that responded to a survey by the Association for Research Organizations in Higher Education (AROHE) in 2012.

APPENDIX A. BRIEF HISTORY OF THE UNIVERSITY OF NEW MEXICO RETIREE ASSOCIATION (UNMRA)

In the spring of 2000, the Staff Council passed a resolution promoting some of the specific interests of retired staff. Following that resolution, a group of retired faculty and staff began meeting with representatives of Staff Council; this *ad hoc* group of retirees included Scott Alley, Anne Brown, L.J. Lovell, Karin Retskin, Mimi Swanson, and Lee Zink.

During the summer of 2002, a questionnaire was sent to 2,041 retired UNM faculty and staff to solicit certain demographic information and to determine the level of interest in forming a Retirees' Association. Surprisingly, the *ad hoc* committee received 771 (38%) responses from which they learned two important facts:

- > 88% of all UNM retirees live in New Mexico, most in the Albuquerque-Santa Fe area. Data gleaned from other universities throughout the U.S. showed that the number of our retirees staying in the local area is unusually high by national standards; and

- 86% of responding retirees expressed interest in creating a retiree organization modeled after similar associations on other U.S. campuses.

These data, along with empirical information provided by several other universities that have comparable retire associations on their campuses, led the *ad hoc* committee to advance the concept of forming a retiree association at UNM. A request was sent to the President's Executive Committee for support and authorization to form a UNM Retiree Association (UNMRA), and their response was very positive: "The President's Executive Committee has reviewed the proposed Retirees' Association and recommends Board of Regents approval to allow the Association to be formed under the general oversight of the University." Numerous very positive additional statements from the Executive Committee demonstrated that the Administration, *at that time*, truly valued retirees. Here are three additional comments extracted from their report:

- "*Retired faculty and staff represent a unique constituency of the University with their special loyalty and support developed from years of employed service.*"

- "*Retirees have historically been an important source for volunteer help including teaching, they are a major source of support for many University-sponsored events that rely on ticket revenue, and they make significant financial commitments through their charitable giving to the University*."

- "*To date, there has not been a readily available avenue to obtain retiree input into administrative policies and procedures and learn about retiree interests and concerns. The Association will give the University an improved channel for accessing this important resource.*"

On Monday, March 3, 2003, the Regents' Finance and Facilities Committee met to make its recommendation to the full Board. Citing the goals of enriching the lives of retired faculty and staff and of finding avenues for the group to stay active within the University, David McKinney (then VP for Business and Finance), outlined the reasons for and goals of the Retirees'

Association; moreover, then Interim President F. Chris Garcia strongly recommended creation and (financial) support of the Association. The Regents' Committee unanimously approved the measure and, later, the UNM Board of Regents gave an official approval to form the UNMRA.

In the next two months, several Association members, co-chaired by Carol Scott Alley and L.J. Lovell, worked tirelessly to get the organization going: old by-laws were re-drafted and the date for the First Annual Meeting was set for April 29, 2003. The meeting was chaired by David McKinney, and the newly-minted UNMRA approved the by-laws and elected the first Board of Directors: Scott Alley, Fred Chreist, Jean Civikly-Powell, Joe Gonzales, Mary Harris, Clarice Jenkins, Jim Morgan, Velma Morgan, Karin Retskin, Rey Saena, Beulah Woodfin, and Lee Zink, who agreed to serve as UNMRA's first Board of Directors President.

In addition to hosting various social and educational events for retirees and keeping the community of retirees informed on pertinent information about UNM and retirement, the UNMRA quickly became a prominent advocate for retirees. One of the first committees established by the Board was the Benefits Committee that continues to work with the UNM Faculty and Staff Benefits Committee.

From 2003 to 2008, membership in UNMRA increased to about 300 active members, but steadily progressive changes since 2010 have stimulated an increase in interest resulting in an active, registered membership of over 735 as of January, 2014. Since 2010, UNMRA has continued to expand its public service, educational, political, and social opportunities. Here are some recent examples of service by UNMRA members: served on several UNM Presidential searches (until recently); financially supported a Presidential Scholarship (2008-2011); participate as an advisor to the UNM Board of Regents; sponsored volunteers for the Mayor's Office of Volunteerism & Engagement (MOVE) for the Albuquerque Reads Program; provided volunteers for the Rio Grande Nature Center, Lobo Women's Golf Tournament, KNME, and others; design and sponsor social activities for members: e.g., wine tastings, Holiday Parties, monthly First Thursday information sessions, Health Fairs for UNM retirees; and continue to strengthen community relations by active participation in meaningful endeavors (e.g., KNME Pledge Drive of December 9, 2013).

The following are a few among UNMRA's priorities through FY 2015: protect against further erosion of retirees' pension COLA through educational and lobbying efforts; continue to advocate for retiree health insurance benefits; develop a Transitional Retirement Plan to make the "final decision" of retirement both easier and meaningful for the individual and the institution; and, finally but not the least, total commitment to work with the Regents and the Administration to develop this plan for an Emeritus College for retired faculty and staff. This last task is the most delicate undertaking ahead because we want to develop a communal contract between retirees and UNM and, thus, improve the current social climate between them.

In little more than a decade, since our modest beginning in 2003, UNMRA has evolved from an idea of several forward-thinking enthusiasts to an influential force on the UNM campus. But there is much work yet to be done during the next few years.

APPENDIX B. SURVEY QUESTIONNAIRE FOR UNM, 2014

UNM | Retiree Association

UNM Retiree Center for Emeriti Faculty and Staff

We currently have a Retiree Association at The University of New Mexico, whose objective is "to enhance the quality of life for its members." This means organizing events of special interest, providing a channel of communications through which retiree interests and concerns can be represented to University administration and to the state, and to establish and provide liaison with appropriate University organizations to assure retiree interests are being recognized.

We are now looking at establishing an UNM Retiree Center for Emeriti Faculty and Staff. The aim of this program will be to initiate and coordinate activities that encourage retired faculty and staff to maintain connections among themselves and with the intellectual and social life of the University. In order to do this properly, we are asking current and future retirees to respond to the attached questionnaire to help guide the direction the organization takes.

We appreciate your taking a few minutes to complete the questionnaire.

1. A function of an Emeriti/Retiree Center should be to enhance the interaction between retirees and the University.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

2. A function of an Emeriti/Retiree Center should be to integrate retirees into the life of the University.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

3. A function of an Emeriti/Retiree Center should be to provide expert service to the University.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

APPENDIX B (cont.).

4. A function of an Emeriti/Retiree Center should be to provide opportunities for retirees to support the ongoing research, teaching and service missions of the University.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

5. A function of an Emeriti/Retiree Center should be to promote lifelong scholarship and research among its retired faculty.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

6. A function of an Emeriti/Retiree Center should be to promote access to and involvement with all activities associated with the University.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

7. A function of an Emeriti/Retiree Center should be to facilitate the availability of scholars and staff who wish to share their knowledge and skills with the University and larger community.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

8. A function of an Emeriti/Retiree Center should be to serve as a focal point for collegial and social interactions.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

9. A function of an Emeriti/Retiree Center should be to serve the University's administration and staff in an advisory capacity on retiree and other issues and policies.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

10. A function of an Emeriti/Retiree Center should be to promote participation and support for campus organizations where involvement would be mutually beneficial.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

APPENDIX B (cont.).

11. A function of an Emeriti/Retiree Center should be to provide lectures and educational services regarding current events on a regular basis.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

12. A function of an Emeriti/Retiree Center should be the establishment of Center programs of interest to retirees, (i.e. Center for Archiving Intellectual Property, Center for Retired Staff Programs, etc.).

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

13. Other suggested functions or activities:

14. I would likely affiliate myself with an Emeriti/Retiree Center if it provided functions, activities and service of interest to me.

Strongly Agree	Somewhat Agree	Indifferent	Somewhat Disagree	Strongly Disagree	N/A

15. Are you currently involved in any academic or service activity at the University?

16. If yes, in what capacity? (Please list activities)

17. In what year did you retire?

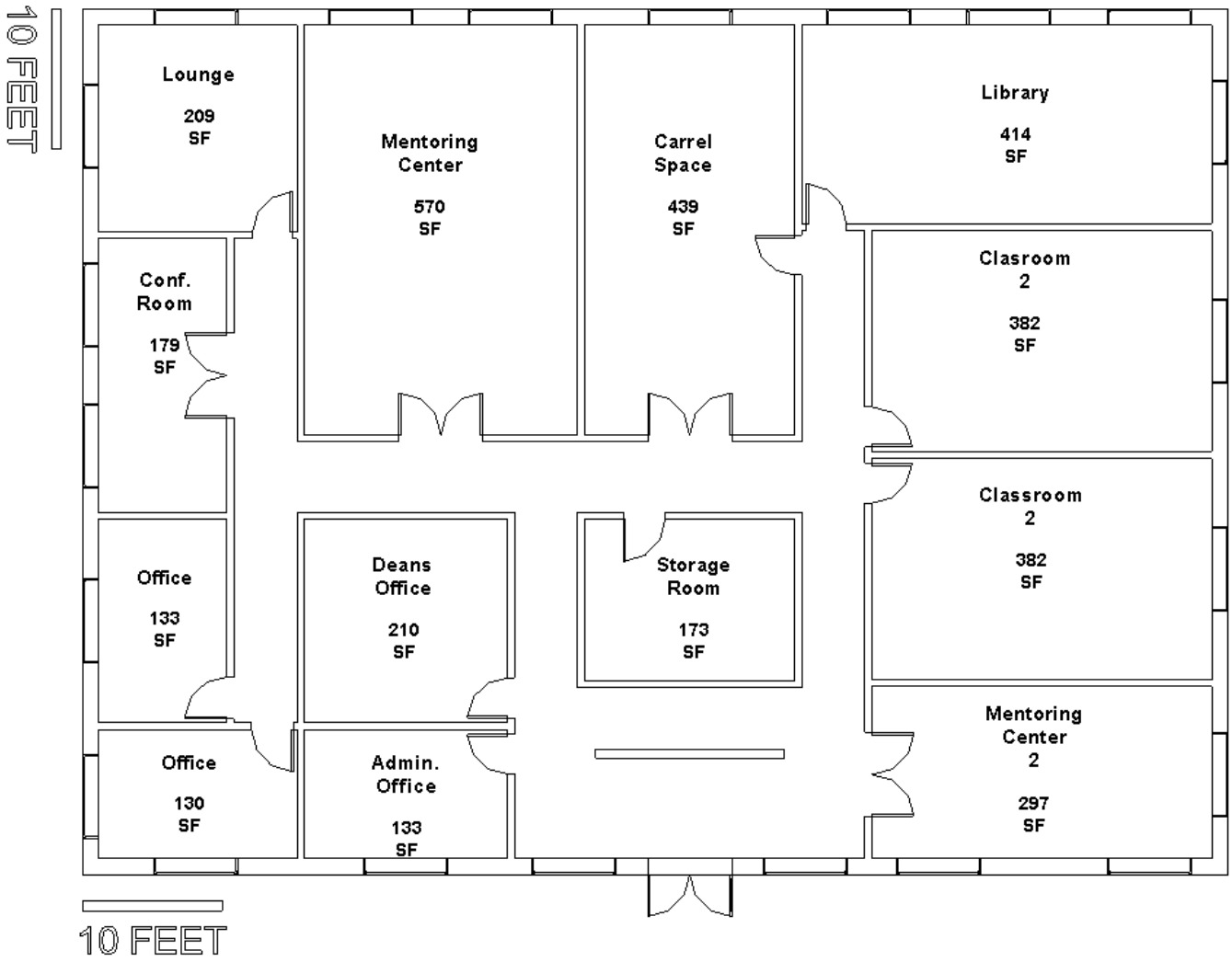
18. How many years are or were you employed by the University?

19. Do or did you hold a staff or faculty position?

20. In what department/administrative unit/service are you or were you employed?

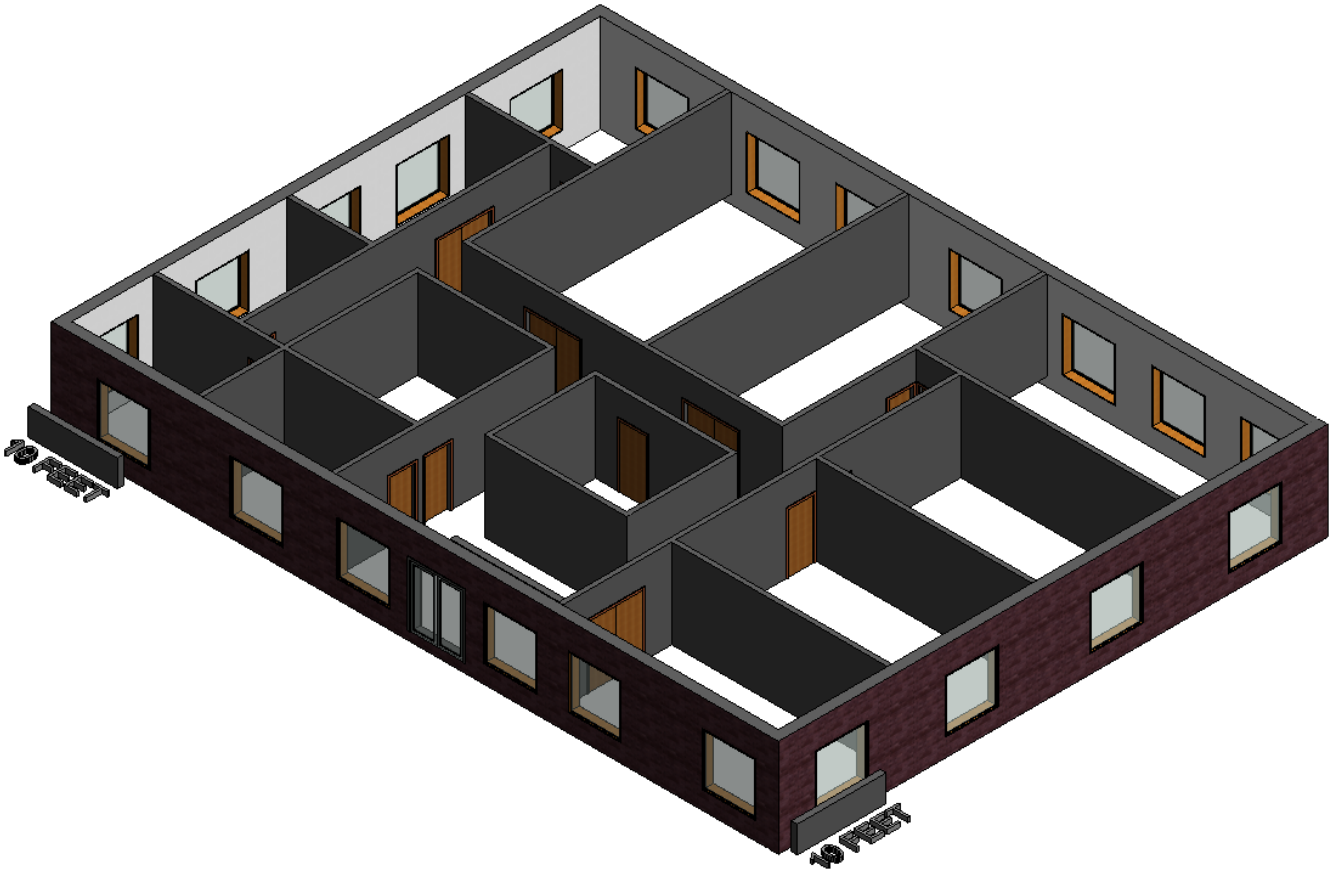
21. Additional comments:

APPENDIX C. UNM EMERITUS COLLEGE FLOOR PLAN



APPENDIX C (cont.). UNM EMERITUS COLLEGE FLOOR PLAN

3 D VIEW



APPENDIX D. YEAR 1: PROPOSED ANNUAL OPERATING BUDGET FOR UNM'S EMERITUS COLLEGE (DEAN'S SALARY @ 0.49 FTE)

	FTE	Amount	Total
Salaries:			
Dean	0.49	$ ca 49,000	
Administrative Assistant	1.00	30,000	
Clerical Assistant	1.00	24,000	
Total Salaries			$ 103,000
Fringes Benefits:			
(25% of Total salaries)			25,750
Supplies:			
Office supplies		1,500	
Postage		1,000	
Copy charges		500	
Telephone		500	
Professional organization membership		500	
Miscellaneous		1,000	
Total supplies			5,000
Equipment :			
Maintenance contracts			2,000
Travel:			
In state		500	
Out-of-state		2,500	
Total travel			3,000
Annual Operating Budget			$ 138,750

APPENDIX E. YEAR 1: PROPOSED CAPITAL EXPENDITURE BUDGET FOR UNM'S EMERITUS COLLEGE

Equipment	Number of Units[1]	Cost Per Unit ($)	Total Cost ($)
Office Desks	**18**	200	3,600
Desk Chairs	**18**	60	1,080
Stackable Chairs/ arms	**116**	50	5,800
Tables – Conference (6′ × 12′)	**1**	1,000	1,000
Tables - Office (18″ × 36″)	**5**	350	1,750
Tables - Round (seat 6)	**2**	300	600
Tables - Library (3′ × 6′)	**2**	100	200
Couch	**1**	250	250
Computers	**9**	1,000	9,000
Printer - Col/FAX/Scan/Copy	**1**	350	350
Printer - Black	**1**	150	150
Projection Screen	**3**	300	900
Projector	**3**	500	1,500
Microwave Oven	**1**	100	100
Refrigerator - Small	**1**	125	125
Carrels	**6**	200	1,200
File Cabinets - Letter (3 drawer)	**4**	100	400
File Cabinets - Legal (3 drawer)	**1**	100	100
White Boards	**2**	50	100
Additional Costs:			
Conference Room - Cabinetry (estimated)			1,500
Lounge - Sink & Plumbing (estimated)			3,000
Lounge - Counter Space (estimated)			2,000
Storage Room - Counter Space (estimated			2,000
Storage Room - Shelving (estimated)			2,000
Library - Shelving (estimated)			3,000
TOTAL COST CAPITAL EXPENDITURES			41,705

[1]All unit costs were compiled in consultation with University Purchasing Office. The capital expenditure budget presented here applies only to furniture and fixture costs and does not incorporate any remodeling costs, which cannot be determined until space is defined. This budget also presumes the entire project would be implemented at one time using only new equipment, an unrealistic assumption with so many commonly-used items in Surplus Property or other storage facilities. Such use would reduce this cost considerably.

APPENDIX F. LITERATURE CITED

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