Background
The Association of Retired Faculty (ARF) at Montana State University was founded in 2004. Its goals are

- to foster the benefit, interests and well-being of retired faculty through social, educational, and promotional activities and
- to encourage continuing retiree contact and involvement with the University, thereby helping to enrich the personal and professional lives of persons in the University and the greater community.

This report describes ARF activities during FY 2010, reviews information gathered during exit interviews with retired faculty, and presents ARF objectives for FY 2011.

Executive Summary
During FY 2010, ARF met with, and received encouragement and support from, MSU administrators. The new MSU emeritus policy was initiated this year. ARF was instrumental in the development of that policy. ARF inaugurated the Capstone Lecture Series through which the public was treated to three entertaining, thought-provocative lectures by MSU retired faculty. ARF initiated the first ever Exit Interview process for retired faculty at MSU. The university may well benefit from the knowledge and experience shared by its retired faculty. ARF was successful in developing a process at MSU by which faculty are informed of various opportunities and options available to them as they transition into retirement. ARF continued its successful series of luncheon presentations of topics of interest to retirees. The ARF offices in Hamilton Hall were inaccessible this year due to construction, but ARF anticipates that it soon will be able to return to those offices. During the next year, ARF will study the merits of expanding its membership to include retired professional employees or all MSU retirees. ARF will also study alternative procedures by which ARF can be recognized as an official component of MSU. At the conclusion of that study, ARF will submit a proposal to the university. During 2011, ARF will determine how best to facilitate the connections of retired faculty volunteers with campus and community organizations or with academic units in the university.

ARF programs and services

The site is actively maintained to provide a reliable, up-to-date source of information. The web pages announce forthcoming events, facilitate communication among retirees, document ARF policies and procedures, and provide accurate information for both retirees and faculty contemplating retirement.

Retirement Information/Assistance
ARF gathers and disseminates information about planning for retirement, navigating the retirement process, and being retired. Any faculty members having questions not covered in the on-line documents are encouraged to contact the ARF Retirement Information/Assistance
Committees: During FY 2010, ARF volunteers gave focused presentations to small groups of interested faculty; topics included health insurance options and financial planning options. Also during FY2010 ARF:

- worked with MSU administrators and the Faculty Senate to implement the new uniform Emeritus Policy for MSU
- collaborated with Human Resources (Lisa Crow) in revising the *MSU Retiree Separation/Termination Checklist*, that must be completed by all retiring faculty (http://www.montana.edu/hr/New-TerminatingEmployee/MSU-Retiree-Checklist 09.doc). The list now contains the following list of options available to retiring faculty:

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a) EMERITUS STATUS
If you are a faculty member, please check one of the following two choices

☐ I want my department head ____________________ to nominate me for Emeritus status (a signed copy of this form will be forwarded *by home department* to the department head and Faculty Senate).

☐ I do not want my department head to nominate me for Emeritus status (a signed copy of this form will be forwarded *by home department* to the department head and Faculty Senate).

b) OTHER OPTIONS (facilitated by the MSU Association of Retired Faculty; http://www.montana.edu/retired/)

If you are a faculty member and want to participate in an EXIT INTERVIEW during the next year (see http://www.montana.edu/retired/arfprocess.htm for information about exit interviews) OR
If you potentially are interested in presenting a CAPSTONE LECTURE (described at http://www.montana.edu/retired/THE CAPSTONE LECTURE.htm) OR
If you would like ADDITIONAL INFORMATION about retirement & the retirement process, THEN please go on-line and use the electronic Retirement Information Form (http://www.montana.edu/retired/RAForm 2002-09.html) to submit your choices for those options.
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Exit interviews upon retirement
In collaboration with the Faculty Senate, ARF manages the process for conducting exit interviews of retired faculty. The results of the exit interviews were submitted to the MSU President, MSU Provost, and Chair of the Faculty Senate.

Capstone Lecture series
A Capstone Lecture is a public lecture sponsored by ARF. It is delivered by a retired faculty member on whatever topic the faculty member judges important; the typical Capstone Lecture contains information and opinions based on a synthesis of the knowledge and experience acquired during the retiree’s career. During FY 2010, there were three Capstone Lectures:

- Gordon Brittain, Prof Emeritus of Philosophy, “Craven Images – The relationship between the sciences and the humanities“
- Gary Strobel, Prof Emeritus of Plant Pathology, “The excitement and fascination of bio-discovery“
- Pierce Mullen, Prof Emeritus of History, “How I came to teach, but stayed to learn“
ARF Luncheons

The ARF luncheon is held in the SUB once per month from September – May. Each luncheon features a presentation by a knowledgeable expert on a topic of current interest to retired faculty, spouses, and faculty nearing retirement. During FY 2010, the guest lecturers included:

- Ken Hapner, Prof. Emeritus of Biochemistry, ARF member, and the retiree representative to both the InterUnits Benefit Committee (IUBC) and the University-wide benefits committee, gave 2 separate presentations on retiree benefits and medical insurance plans, especially the new MAPPS program and the new UrX (prescription drugs) program.
- Dr. Christiana Stoddard, Assistant Professor in the Department of Agricultural Economics and Economics, "Key Issues in Health Care Reform"
- Norm Eggert, Retired Prof. of Mathematics, ARF member, and Kelly Ziebarth, RSVP, "Volunteer Opportunities in the Community"
- Anne Anderson, TIAA-CREF representative for Montana, "Withdrawing funds from investment vehicles during retirement. When and how much should you withdraw, including funds in 403bs, Roth and conventional IRAs"
- Dr. Tom McCoy, Vice President for Research, Creativity, and Technology Transfer, “Research focus areas at MSU and retiree involvement”

ARF liaison with MSU

During FY 2010, ARF met with President Cruzado, Provost Joe Feddock, and VP for Research Tom McCoy. The meetings were congenial, informative, and productive. In May, 2010, ARF initiated a program of visiting each Dean and Department Head. The purpose of the meetings is to inform the administrators about ARF, to seek their cooperation in directing retirement-age faculty to the resources and services provided by ARF, to acquire information about the relationship between academic units and retirees, and to gather administrators’ suggestions for improving MSU connections with retirees and for ways in which retirees may be able to assist the university. The visits were well-received and productive. The results are being aggregated and will be reported at a later date.

ARF survey of volunteerism

In an informal e-mail survey, ARF discovered that faculty retirees provide an extensive volunteer force that positively benefits a broad range of organizations both at MSU and in the community at large.

ARF liaison with retired faculty organizations at other universities

During FY 2010, Bob Swenson represented ARF at regional and national meetings of the Association of Retirement Organizations in Higher Education. These interactions with other retiree organizations around the country provide opportunities to learn about exciting and innovative programs at other universities; as well as to inform them about our activities. One of the most successful innovations for both universities and retirees is the Emeritus College, where in a sense the concept of “retirement” is eliminated and one moves from a Professor to an Emeritus Professor within the academic family. Over the coming years it may be worth exploring this concept for MSU.

ARF Offices in Hamilton Hall

For most of FY 2010, the offices were inaccessible due to the Hamilton Hall renovation project. We are anxious to return to that space and await the conclusion of construction.
**ARF in FY 2011**

**Executive Committee**

- **President:** Marty Hamilton (mhamilton@biofilm.montana.edu)
- **Vice-president (President-elect):** John Jutila (jcjutila@bresnan.net)
- **Secretary/Treasurer:** Don Mathre (upldm@montana.edu)
- **Director of Programs:** Jerry Coffey (coffey@english.montana.edu)

**Membership**

All faculty who retire from MSU are eligible for voting membership in ARF. Soon-to-be-retired faculty, and retired faculty members from other institutions of higher learning who have a relationship with MSU, and spouses of MSU retired faculty are eligible for associate (non-voting) membership.

**Dues schedule for FY 2011**

<table>
<thead>
<tr>
<th>Membership Type</th>
<th>Annual Dues</th>
</tr>
</thead>
<tbody>
<tr>
<td>Regular dues</td>
<td>$15/yr</td>
</tr>
<tr>
<td>Members desiring to support ARF beyond regular dues</td>
<td></td>
</tr>
<tr>
<td>Sustaining members</td>
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<tr>
<td>Contributing members</td>
<td>$50</td>
</tr>
<tr>
<td>Benefactor</td>
<td>$100</td>
</tr>
<tr>
<td>Life-time membership</td>
<td>$200</td>
</tr>
</tbody>
</table>

New members pay no regular dues during their first year of membership. Associate members pay no dues. The business year for ARF is from July 1 to June 30.

**Initiatives for FY 2011**

In addition to its regular activities (such as luncheons, exit interviews, Capstone Lectures, and advocacy for retirees), ARF plans to work on the following initiatives:

- Investigate the merits of expanding ARF membership to include professional retirees or all MSU retirees
- Craft and submit a proposal for formal recognition of ARF as a component of MSU
- Develop an ARF volunteer clearing house to connect retiree volunteers with academic units or organizations, both on and off-campus
- Promote ARF coordination with the MSU Foundation in MSU fund-raising campaigns