Summary

The status and visibility of the MSU Association of Retired Faculty (ARF) was enhanced by its proactive, responsive, and collaborative efforts in FY2012. In the future, when retirement issues arise at MSU or in the Montana University System (MUS), ARF likely will be contacted to provide the ideas, opinions, and recommendations of retired faculty.

During FY2012, the MSU Association of Retired Faculty (ARF) prepared a position statement requesting new, improved MSU policies pertaining to retirement incentives, phased retirement, post-retirement employment, and the list of benefits and privileges accorded retired faculty. Other MSU organizations that serve the faculty of the university agreed to collaborate in crafting and securing those policies.

The Montana Teachers’ Retirement System (TRS) is faced with a $630 million shortfall in its projected liability and it will be making changes to remedy that problem. In response to a TRS request for comments or suggestions, ARF submitted a letter stating its opinion that all TRS members at MSU, whether active or retired, should be exempt from any adverse changes, especially two changes that TRS is considering: (i) reducing the guaranteed annual benefit adjustment (now 1.5%) and (ii) reducing the multiplier (now 1/60) that determines the pension amount.

Retiree health benefits also are under pressure due to unfunded liability rules. ARF members on key Montana University System (MUS) benefits committees were able to participate in the evaluations of the proposed remedies and in the selection of health insurance options for retired faculty.

During FY2012, ARF continued its liaison, program, and service functions, including:

- Sponsored monthly luncheon presentations on topics of interest to retirees.
- Sponsored the Capstone Lecture Series.
- Served as a key information source for retirees, faculty contemplating retirement, and faculty in the process of retiring.
- Met with MSU President Cruzado & Provost Potvin to discuss issues of mutual interest.
- Attended meetings of the various MSU Councils (ARF reviewed the Planning Council’s draft MSU Strategic Plan and requested a stronger statement of support for its faculty, whether active or retired).
- Visited MSU dean and department heads to discuss strategies for maintaining connections between retired faculty and MSU.
- Coordinated Reflection and Feedback Interviews (Exit Interviews) for retired faculty.
- Expanded and updated its web site.
- Published electronic newsletters about activities, current issues, and forthcoming events.
- Participated in a NW regional meeting of university retirement organizations.

The most serious problem facing ARF is that too few retired faculty are active participants. In order to continue timely advocacy for retired faculty and to make progress on projects for improving both retirement policies and retiree connections to MSU, more retired faculty volunteers are needed to work on projects or serve as officers.

In 2013, ARF will take on focused projects in addition to its on-going services & programs. It will collaborate with active faculty in developing and promoting a new, flexible policy for phased retirement. ARF will make a list of retired faculty benefits & privileges for consideration by MSU. ARF will collaborate with the university in creating a master list of faculty retirees. ARF will conduct a survey to document professional activities performed by MSU retired faculty.
“Retirement should be viewed as an ongoing process or transition, not a specific event or date. It should be a period of time tailored to the needs, desires, abilities, and wishes of the individual. The retirement process should be flexible to recognize that not one size fits all, to recognize the many academic life style choices and needs.”


Background

Mission: MSU Association of Retired Faculty
The Association of Retired Faculty (ARF) at Montana State University was founded in 2004 to
• foster the benefit, interests and well-being of retired faculty through social, educational, and promotional activities and
• 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.

Membership
All faculty members who retire from MSU are eligible for voting membership in ARF. Soon-to-be-retired faculty, 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. During FY2012, ARF had 35 dues-paying members.

Dues

<table>
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<th>Membership Type</th>
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<tr>
<td>Regular dues</td>
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<tr>
<td>New retiree</td>
<td>No dues during 1st year</td>
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<tr>
<td>Associate members</td>
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Support for ARF beyond regular dues

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<td>Contributing members</td>
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<td>Benefactor</td>
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</tr>
<tr>
<td>Life-time membership</td>
<td>$200</td>
</tr>
</tbody>
</table>

Financial

As of June, 2012, ARF had cash on hand of $2364 and no outstanding debts. Funds derived from dues are used primarily to support brochures, the Capstone Lecture series, and the monthly luncheons. ARF appreciates the operations support provided by the MSU Office of the Provost, including office space, office furnishings, telephone service, a network-connected computer and associated equipment, supplies, dues for ARF’s membership in the Association of Retirement Organization in Higher Education (AROHE), and support to attend regional and national retirement organization meetings.

FY2012 officers
President: John Jutila
Vice-president: Pierce Mullen
Secretary/Treasurer: Don Mathre
Director of Programs: Jerry Coffey

Purpose of this report

ARF submits a report to its membership at the end of each fiscal year. The report is published on the ARF web site and is distributed electronically to the membership and to MSU officials including the MSU President, Provost, Faculty Senate, Human Resources, Alumni Foundation, and AFMSU. This report describes ARF’s activities during FY 2012 and presents its plans for FY 2013.

FY 2012 programs and services

MSU and MUS retirement policies

If MSU experiences the same trend for delayed retirement as observed in national surveys, the MSU faculty will contain many senior faculty members and relatively few entry-level faculty members. Retirement decisions by current senior faculty are based on circumstances not applicable to the previous generation, including improvements in both the health and life-expectancy of senior faculty. Most active faculty members are in the ORP (a defined-contribution plan) instead of the former TRS (a defined-benefit plan). Consequently, an individual’s retirement planning must take into account the effect of the great recession on ORP investments. Here are some recently-published observations and recommendations (V. Gewin, 2012, “Sticking Around,” Nature, 483:233-235). More than half of active
university faculty expect to delay retirement or to never retire (Fidelity Investments survey). At least 60% of university faculty aged 60+ would like to, and expect to, work past the conventional retirement age of 65; 15% will have to continue working past age 65 because of financial concerns (TIAA-CREF survey). Postponed retirement and increased life expectancy are producing a discouraging situation for entry-level faculty (AAUP). Universities must adjust retirement policies to fit the needs of faculty members; the existing model doesn’t fit the twenty-first century (spokesperson for the American Council on Education – ACE). Phased-retirement schemes, presently available at 1/3 of US campuses, have the most success in encouraging retirement (AAUP). This is an opportunity for universities to be creative – for example, establishing ‘half-time’ tenure-track lines that could be split between early-career researchers and faculty members entering phased retirement agreements – to help meet career and personal issues for both junior and senior faculty members (spokesperson for ACE). The university should build a fluid, flexible system where older faculty members can contribute to the university, perhaps even electing to turn over their tenure-track line for another position that is mutually beneficial to all (U. Calif.-Berkeley administrator).

Possibly because of the historical dominance of TRS retirements, the MSU retirement policies are more restrictive than at peer institutions where defined-contribution plans like ORP are the standard. In the last decade, many universities have developed a number of strategies and policies that provide flexible retirement options for ORP faculty retirees. ARF believes that MSU should follow suit and establish new retirement policies for making retirement more attractive and providing an opportunity to transition into retirement. During the transition period the retiring faculty member possibly could remain engaged in teaching, research, or service activities at the university, but at a reduced level. Because ORP retirements are just beginning, this is an opportune time to create policies that will allow MSU to retain the knowledge and experience of senior faculty and to hire potential-laden young faculty.

ARF believes that improved retirement policies will improve faculty morale and faculty retention, as well as strengthen the bond between the university and its retired faculty. Consequently, ARF prepared a position statement (see the Appendix to this report) requesting the creation of new, improved MSU policies for

- retirement incentives,
- phased retirement,
- post-retirement employment, and
- the rights, benefits, and privileges accorded retired faculty.

During FY2012, ARF met with organizations that serve the faculty of the university (including the Associated Faculty of MSU and the MSU Faculty Senate) to discuss the need for new retirement policies, to ask for support in crafting them, and to develop strategies for securing acceptance. The active faculty groups agreed in principle to collaborate in crafting and securing those policies. It is anticipated that formal work groups will be formed during the summer and that policies proposals will be crafted during the fall.

**TRS pension**

FY2012 was not a kind year to retired state employees across the country. *Consumer Reports* (July 2012) said that 26 states squeezed benefits for new hires, some other workers, and retirees. Although the situation in Montana is not as grim as in some states, the Montana Teachers’ Retirement System (TRS) has a projected shortfall of $633 million. Most of the ARF membership is in TRS and therefore it was important to review the alternative changes under consideration by TRS. ARF invited David Senn, TRS Director, to come to Bozeman. He and Will Harmon, TRS Communications Manager, kindly accepted and they gave a noon luncheon presentation in the SUB. David Senn explained the causes of the TRS unfunded liability and provided a list of remedies gleaned from the decisions made in other states facing similar shortfalls. He invited follow-up discussions and suggestions from both ARF and individual retired faculty members. Subsequently, ARF President John Jutila sent a letter to TRS stating ARF’s opinion that all TRS members at
MSU, whether active or retired, should be exempt from any adverse changes, including the listed alternatives of reducing the guaranteed annual benefit adjustment (now 1.5%) or reducing the multiplier (now 1/60) that determines the pension amount.

**Health insurance benefits**

Potential changes to the Montana University System (MUS) Health insurance program are a concern for retirees. During this past year ARF continued its efforts to make retired faculty aware of medical insurance choices. ARF members Doug Young and Ken Hapner served on the MSU Benefits committee and the IUBC; Ken Hapner also served on the IUBC retiree subcommittee and the Pharmaceutics Technical Advisory Committee of the URx pharmacy program. Thanks to their voluntary efforts, ARF is an established participant in conversations and decisions regarding health insurance options for retirees. Their participation and advocacy has been very important. FY2012 was Ken’s last year as the MSU retiree representative on the MSU Benefits Committee, the MUS Inter-unit Benefits Committee (IUBC), and the IUBC Retiree Subcommittee. Doug Young has accepted ARF’s nomination to serve on those three committees during the next term. The IUBC is influential in shaping retirees’ health care options and committee membership requires a serious commitment of time and energy. ARF expresses its gratitude to Ken for his dedicated and effective years of service and to Doug for agreeing to represent retired faculty during this period of financial stress in Montana.

**Dissemination of retirement information**

ARF gathers and disseminates information about planning for retirement, navigating the retirement process, and being retired. The primary and official sources of retirement information are the MSU Human Resources (HR) office, the Teachers Retirement System, or TIAA-CREF. For answers to lingering questions, active or retired faculty members are encouraged to consult ARF’s on-line documents or to contact ARF and arrange a meeting with a retiree volunteer. Based on its members’ practical experience, ARF can provide information that complements the essential information provided by the official sources.

During FY 2012, ARF held open informational meetings on insurance enrollment. Ken Hapner met individually with retirees who had questions about the health insurance choices and procedures for retired faculty. In collaboration with MSU Human Resources, Jerry Coffey presented pre-retirement workshops for MSU faculty. Jerry also met separately with individuals who needed additional information about planning their retirements. ARF notes with appreciation the retiree assistance that Laura Underkofler in the HR office graciously provides retirees.

**Liaison with MSU**

During FY2012, ARF continued its liaison program with MSU administrators, staff, committees, and councils. The goals were to provide MSU leaders with information about ARF, to seek their cooperation in directing retirement-age faculty to the resources and services provided by ARF, to improve the information that ARF disseminates, to acquire information about the relationship between each MSU unit and its retirees, and to gather suggestions for improving MSU connections with retirees including ways in which retirees may be able to assist the university. By maintaining good communication with university constituencies, ARF believes it will be informed about proposed or forthcoming policies that affect retirees and can advocate for retirees when such policies are being developed.

During FY2012, ARF attended semi-annual meetings with President Cruzado, and Provost Martha Potvin to discuss issues of mutual interest, to inform the MSU leaders about ARF’s progress and plans, and to seek their guidance and assistance. Representatives from ARF and the Associated Faculty of MSU met on multiple occasions. ARF representatives attended meetings of the five MSU Councils. Don Mathre was welcomed on the Budget Council chaired by Vice-President Terry Leist. He participated as a full member of the Council, especially during the Council’s deliberations on distributing approximately $1.2 million from student tuition to a variety of programs on campus.
In FY2012, ARF representatives met with various MSU administrators according to a schedule for visiting each department head and college dean at least once every three years. New department heads and new deans will be visited when they arrive on campus. The meetings with department heads and deans indicated that there was general enthusiasm for ARF’s goals. This liaison activity has opened the door for cooperation on issues of mutual interest, provided ARF with important information, produced some good ideas for ARF to pursue, and increased ARF’s on-campus visibility. One finding that should be pursued relates to service that MSU retired faculty potentially can provide as mentors to new faculty and new administrators. The institutional memory and the experience of retired faculty could be particularly helpful to new administrators.

Web site (http://www.montana.edu/retired/)

The ARF webmaster Dwight Phillips updated and extended the ARF site to provide a reliable, current 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. Dwight has taught Marty Hamilton how to edit the website so he can be Dwight’s backup.

Newsletter

Don Mathre, Secretary, regularly produced issues of the ARF newsletter (The Bow Wow Times). Each issue listed activities and upcoming events, described ARF projects, and presented new developments in federal, state, or university policies that potentially affect retired faculty. Each issue of the newsletter was sent to the membership as an email attachment. All issues of the newsletter are archived on the ARF web site.

Capstone Lecture series

The Capstone Lecture is a public lecture sponsored by ARF sometimes jointly with departments or colleges. The lecture 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 2012, the Capstone Lectures included:

- **Denbigh Starkey**, Professor Emeritus of Computer Science: "The Life and Intelligence of Alan Turing." The lecture honored the 100th anniversary of the birth of Alan Turing, the intellectual leader of the Ultra project at Bletchley Park in World War II which broke the German Enigma code and developed the first general purpose electronic computer. ARF co-sponsored the lecture with the Computer Science Department. April 2, 2012.

- **Cathy Conover**, retired VP of Communications and Public Affairs: "Hands-on, Active Learning: Six sessions lobbying in the Montana Legislature." Cathy was the chief spokesperson for MSU during many legislative sessions and her lecture provided insights from her unique perspective on how the legislature works and how the university system presents itself to the legislature. February 16, 2012.

Retired faculty reflection & feedback interviews

In collaboration with the Faculty Senate and the MSU Provost, ARF coordinates the process for conducting reflection and feedback interviews of retired faculty. Note that these interviews were previously called “exit interviews.” However, they are quite different from traditional exit interviews. They are voluntary, cover topics entirely at the discretion of the retiree, and the “interviewers” record and document the discussion without an agenda of their own (see http://www.montana.edu/retired/ Assistance-FeedbackProcess_2012-01-15.pdf). A summary of comments and suggestions recorded during the FY2012 interviews were sent to the MSU President, Provost, and Chair of the Faculty Senate.

Monthly luncheon presentations

The ARF brown bag luncheon presentations are scheduled approximately once per month. Each talk is by a knowledgeable expert on a topic of current interest to retired faculty, spouses, and faculty nearing retirement. Objectives of this program include attracting retired and active faculty to the same forum and stimulating discussion on issues of common interest. The theme for the year was how older faculty might use their...
experience and intelligence after retirement, perhaps in new direction.

For example, the first speaker was retired attorney Paul Wylie. Paul is a chemical engineering who, after a few years of working in industry, studied for and was granted a law degree. Using his engineering background, he became a national authority on biomedical patents. However, his presentation was not about patents – instead, Paul discussed his post-retirement research in western history. Paul became intrigued with one infamous 19th century Montana character and his research culminated in the publication of a book: The Irish General: Thomas Francis Meagher (2011, Univ. of Oklahoma Press).

The second speaker, Richard C. Sabo, MD, a retired surgeon and former President of the American College of Surgeons (2002), also pursued a different avocation following retirement, namely his long-time interest in astronomy. He has become a serious student of variable stars and has published and presented professional papers on that subject to astrophysical groups in this country and in England. He currently works on that subject with members of the MSU physics group.

Professor Emeritus of Mathematics Norm Eggert discussed his volunteer work with the Red Cross in disaster areas, both nationally and in Montana. Upon retirement he and his wife worked in Kazakhstan and travelled extensively in Europe and Asia before returning to Bozeman and service as a Red Cross volunteer.

Some luncheon presentations were about practical aspects of retirement; e.g., health insurance. With changes in retirees’ health care systems occurring so rapidly and so profoundly, these sessions provided retirees with the best and latest information available.

ARF wishes to thank all presenters and attendees. These noon sessions have become a significant, well-attended, ARF activity. During FY 2012, the lecturers included:

- Dennis Defa, Chief Human Resources Officer: “Role of HR regarding retirees and potential retirees.” June 20, 2012.
- Tom Wessel, Professor Emeritus of History: "What Historical Consulting Can Do For You". April 18, 2012. Tom served as an expert witness in a variety of administrative law courts. His historical expertise contributed to the resolution of Indian claims trials involving compensation for governmental mismanagement of reservation resources. April 18, 2012.
- Michelle St. Germain (Helena) and Bonnie Anzick (Bozeman): “Update on recent changes at New West.” New West is shedding its commercial (private) insurance business and is emphasizing its Medicare Advantage offerings, including MUS-MAP that is currently available to Medicare eligible retirees. February 15, 2012.
- Michelle Meade, Assistant Prof. of Psychology: "The Ageing Brain." Michelle explained how brain functions can continue to work at a high level for such activities as described in previous noon-time presentations. Ageing enhances global memory, which, as other levels decline, help to overcome potential memory debilitation. Research shows that regular mental, physical, and social activities can help maintain a retiree’s cognitive abilities. January 18, 2012.
- David Senn, Director, and Will Harmon, Communications Manager, Montana Teachers Retirement System: “Overview of TRS Long-Term Funding.” December 7, 2011.
- Norm Eggert, Professor Emeritus of Mathematics: Coordinating Red Cross’s timely support of disaster victims, Nov. 16, 2011.
- Paul Wylie, retired patent/intellectual property attorney, MSU alumnus, and author: “Gen-
eral Thomas Meagher, first territorial governor of Montana.” September 21, 2011.

**MSU Alumni Association annual dinner**

The MSU Alumni Association held its annual dinner for retired faculty on May 21, 2012. The hosts were Jim and Alice Sargent; Jim was an entertaining, humorous emcee. MSU President Waded Cruzado and Michael Stevenson & Jaynee Groseth of the MSU Alumni Foundation gave welcoming addresses. ARF Vice President Pierce Mullen spoke briefly about ARF. Ted Williams delivered the featured presentation: *Historic American Flags*.

**Retiree Network**

During FY 2012, ARF President John Jutila attended the Northwest Regional Meeting of the AROHE in Spokane. The meetings were organized around four topics: (1) Recruitment and retention of members, (2) Relationships with our universities, foundations and alumni associations, (3) Retiree benefits including retirement policies, perks and health insurance issues, and (4) Methods of raising income for programs and scholarships. John chaired the session for topic (3). Such interactions with retired faculty organizations provide opportunities to learn about exciting and innovative programs at other universities.

ARF has maintained regular contact with the nascent retiree association at the University of Montana. When the folks in Missoula are ready, the two associations plan to meet on a regular basis. The associations will collaborate on policies and proposals that pertain to retired faculty in the MUS.

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**Recent events of importance to faculty retirement at MSU**

<table>
<thead>
<tr>
<th>Year</th>
<th>Event</th>
</tr>
</thead>
<tbody>
<tr>
<td>1993</td>
<td>All new faculty hires were required to enroll in the Optional Retirement Program (ORP); TRS was no longer an option</td>
</tr>
<tr>
<td>1994</td>
<td>Mandatory retirement age illegal for tenured faculty</td>
</tr>
<tr>
<td>1998</td>
<td>Universities allowed to offer voluntary retirement incentives that are age dependent; this decision led to a variety of new ways to encourage retirement and to new rights, privileges, and benefits for retirees</td>
</tr>
<tr>
<td>2002</td>
<td>Inaugural meeting of AROHE which became the clearing house and repository for retiree information and programs</td>
</tr>
<tr>
<td>2003</td>
<td>AAUP publishes its <em>Survey of Changes in Faculty Retirement Policies</em></td>
</tr>
<tr>
<td>2004</td>
<td>MSU Association of Retired Faculty founded</td>
</tr>
<tr>
<td>2008</td>
<td>The “great recession” diminishes the value of many ORP investments</td>
</tr>
<tr>
<td>2011</td>
<td>MUS IUBC partitions health insurance for retired faculty into two distinct premium classes based on the Medicare eligibility of the retiree &amp; spouse</td>
</tr>
<tr>
<td>2012</td>
<td>TRS confronts a serious shortfall in serving its projected pension payments</td>
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**FY2013 Information**

**FY2013 ARF officers**

- President: Pierce Mullen (pierce3@bresnan.net)
- Vice-president (President-elect): Search in progress
- Secretary/Treasurer: Don Mathre (upldm@montana.edu)
- Director of Programs: Jerry Coffey (coffey@english.montana.edu)
Call for volunteers

Because of its effective advocacy for retired faculty and its successful programs for retirees, ARF has become a respected component of MSU and the MUS system. However, in order to continue timely advocacy for retired faculty and to make progress on projects for improving both retirement policies and retiree connections to MSU, more retired faculty members must get involved. A serious problem facing ARF is that too few retired faculty are active participants. ARF urgently needs retirees to work on projects & services and to serve as officers. If you are eligible for ARF membership, please join your colleagues in working at a comfortable retiree pace towards worthwhile and satisfying goals – volunteer by contacting any ARF officer.

FY2013 Initiatives

In addition to its regular activities (such as luncheons, exit interviews, Capstone Lectures, and advocacy for retirees), ARF plans to work on four initiatives as described below.

MSU and MUS phased retirement policies
ARF will collaborate in developing and promoting a new policy for phased retirement. The target policy will be flexible enough to include conventional post-retirement employment options. Active faculty members and the organizations that represent them have the main responsibility for a new policy. ARF members will help by sharing their personal experiences, by searching for good phased retirement policies at other universities, and by gathering data on phased retirement plans at peer institutions.

Rights, benefits, and privileges
By offering a generous list rights, benefits, and privileges to retired faculty, MSU can build goodwill among retired faculty, encourage retirement by senior faculty, and increase the morale and retention of active faculty. At other universities including the University of Montana, upon retirement a faculty member is handed a list of rights, benefits, and privileges for retired faculty. At MSU, there is no such list. Although ARF has a list (http://www.montana.edu/retired/Advantages.htm) based on studying the faculty handbook, searching MSU web pages, and interviewing MSU officers, it is neither official nor complete.

ARF believes that it is important for the university to sanction and publish a list of rights, benefits, and privileges so that all faculty members know what will be available to them. During FY2013, ARF will craft a proposed list, primarily based on a survey of policies at peer institutions. This effort will be conducted in collaboration with the MSU administration, AFMSU, the Faculty Senate, and the Retirees’ Association at the University of Montana.

Directory of retired faculty
There is no official list of MSU faculty retirees. ARF volunteers Tom Roll, Bob Swenson, and Don Mathre have merged incomplete lists from various sources, but it is difficult to update and maintain. During FY2013, HR, the MSU Alumni Foundation, and ARF will collaborate in developing and maintaining a reliable directory of MSU retirees. ARF will investigate the cost of developing an on-line registration system for retired faculty and spouses to use for registering or withdrawing from the directory.

Survey of MSU retired faculty: post-retirement professional activities
Anecdotal data indicate that many MSU faculty members remain professionally active after retirement. Some continue to teach and mentor. Some conduct research, write, edit, review, or lecture. Some start up a company or work with companies or governmental agencies that use their professional knowledge and experience. Post-retirement professional contributions might be within the university or outside of the university. Such contributions obviously are beneficial to the university, state, nation, and professions. It would be informative to determine the total amount of professional activity among retired faculty. During FY2013, ARF plans to conduct an informal survey via its newsletter.

The modern view of academic retirement necessitates modern retirement policies and procedures for MSU Faculty
[a position statement from the MSU Association of Retired Faculty]

For university faculty retirees, the day after retirement wasn’t different from the day before retirement. The retiree’s knowledge, experience, and professional network were unchanged and, for many retirees, years of continued professional involvement lay ahead. As a group, the retired faculty can look back on a record of major accomplishments. During their academic careers they developed curricula and instructional strategies for the spectrum of education, from K to 12, from BS/BA to PhD and Post-doc training, and for outreach or community education delivered via the web or on-site instruction. Their body of research and creative work has been widely recognized and appreciated. They conceived and articulated the basis of understanding that now guides their branches of learning. They possess unique knowledge and experience that is not immediately replaceable. The university can retain some of that expertise by creating an environment that entices retired faculty to maintain university connections. It is in the university’s interest to cultivate continued professional involvement with its retired faculty.

MSU has made some progress towards integrating its retired faculty into the campus community; e.g., forming the MSU Association of Retired Faculty (ARF) and providing HR staff to assist faculty members as they transition into retirement. Although some faculty members retire with specific plans that preclude connections with MSU, many would welcome an opportunity to maintain academic connections. On the other hand, a significant minority of retirees indicate that they will refrain from such university connections for various reasons, including belief that the university or the university system treated them unfairly, disrespected them, or wants nothing further to do with them. The causes of such perceptions must be identified and corrected. ARF members conducted an informal survey of retirement policies at other universities to gather ideas that could help MSU improve its relationship with faculty retirees. A clear picture emerged. Research universities believe that involved, connected retired faculty is an important component of their institutions and many have implemented new retirement policies and procedures for building the connections. They view faculty retirement as an ongoing process or transition, not a sudden change on a specific date. Because there are many ways to blend academic activity with retirement life styles, the new policies are flexible enough that retirement can be tailored to the needs, desires, abilities, and wishes of both the individual faculty member and the university.

The modern view of academic retirement necessitates modern retirement policies and procedures. MSU and MUS retirement policies and procedures are out-of-date and deficient in many respects. For both of the MSU retirement plans, TRS and ORP, these retirement policies need immediate attention:

- (i) phased retirement,
- (ii) retirement incentives,
- (iii) post-retirement employment, and
- (iv) the bundle of rights, benefits, and privileges accorded retired faculty.

In principle, MSU’s faculty retirement rules are easily fixable by adopting proven successful retirement policies. In practice, however, faculty constituencies need to be educated about retirement policies. It will require a serious, committed effort to sort out the best ideas and craft a mutually beneficial retirement policy. ARF proposes that faculty constituencies convene a collaborative Retirement Policy Work Group (WG). The WG would study the present retirement policies and alternatives, identify and prioritize the main areas of concern, and prepare recommendations. ARF is willing and able to participate on the WG. Ultimately, the recommendations would have to be presented to the appropriate jurisdiction, whether MSU, MUS, or the Montana legislature, with each presentation led by a separate set of faculty representatives, depending on the responsibilities of each faculty body. Success in these endeavors would bring about major changes that not only produce constructive relationships between retired faculty and the university but also improve the morale and retention of active faculty. MSU would become an even greater university.

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1 The MSU Association of Retired Faculty (ARF) was founded in 2004 for purposes of facilitating the continued connection of retired faculty to the university and fostering the well-being of retired faculty and spouses. ARF reports to the MSU Office of the Provost which provides ARF with office space (338 Culbertson Hall) and a modest operations budget. Programs are also supported by membership dues, currently $15/yr. Management, program work, and communication tasks are accomplished by retired faculty volunteers and elected officers. ARF newsletters, web pages, and special public presentations are an important and timely source of information for retirees and active faculty transitioning into retirement, thereby significantly reducing traffic to both MSU and MUS human resource administrators. ARF is the only communal voice for retired university faculty in Montana. When university or state administrators desire a dialogue with retired university faculty, ARF is the point of contact. For example, within the past year, the Director of the Montana Teachers’ Retirement System and the Director of MUS Benefits have come to Bozeman to participate in ARF’s forums. As MSU and state agencies deal with challenging program decisions that affect retired faculty (e.g., the mandate to eliminate unfunded liabilities as measured by new accounting rules), ARF is the unique source for feedback, suggestions, and evaluations from retired faculty. The University of Montana is forming a similar association of retirees (http://www.umt.edu/retirees/).