News About University Faculty Retirement

A recent article in Nature (www.nature.com/naturejobs/science/articles/10.1038/nj7388-233a) discussed university faculty retirement trends and the need for new retirement policies. In brief, the article said:

• More than half of active university faculty expect to delay retirement or to never retire (Fidelity Investments survey)

• 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)

• We have to 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)

• Phased-retirement schemes, presently available at 1/3 of US campuses, have the most success in encouraging retirement (AAUP)

• Phased-retirement programs ease faculty members into the transition towards retirement, and help administrators to manage the campus workforce (spokesperson for the American Council on Education – ACE)

• Universities have to change the way they adjust to the needs of faculty members; the existing model doesn’t fit the twenty-first century (ACE)

• 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 (ACE)

Report on FY2012 Programs and Projects

NORTHWEST RETIREES HIGHER EDUCATION ASSOCIATIONS ANNUAL MEETING: John Jutila, ARF President, represented MSU at this meeting held in Spokane, WA, in May. He found that retiree associations on most of the campuses in this region face the same issues that we do here at MSU. John led a discussion on retirement policies, perks, and health insurance.

ARF ANNUAL REPORT: The annual report for the fiscal year ending July 1, 2012, is almost complete and soon will be available on-line at http://www.montana.edu/retired/officers.htm.
MONTHLY LUNCHEONS: Our monthly luncheons began again in Sept with a talk by Paul Wylie on General Thomas Meagher, first territorial governor of Montana, followed by Dr. Richard Sabo in October with a talk on his progression as a publishing amateur astronomer. In November, Norm Eggert described his work with the Red Cross as a leader responsible for organizing volunteers to provide timely assistance to folks displaced by disasters such as fires and floods. The December talk was given by David Senn, Director of the Montana Teachers Retirement System who gave us an update on TRS and where it stands financially (see the latest info about the TRS potential funding shortfall at http://www.trs.mt.gov/Publications/TRSfunding.asp). Spring luncheon speakers included Dr. Michelle Meade, Assoc Prof of Psychology on the ageing brain, New West representatives Michelle St. Germain (Helena) and Bonnie Anzick (Bozeman) discussed recent changes at New West and their potential impact on retirees' choices of health insurance offerings, Tom Wessel spoke about his work as a historical consultant and his experiences as an expert witness in Indian claims trials, John Holte, Senior Consultant with TIAA-CREF spoke on “Money matters in retirement”, and Dennis Defa, Chief Human Resources Officer here at MSU spoke on the role of Human Resources regarding retirees and potential retirees.

To volunteer or offer suggestions for luncheon speakers, contact Pierce Mullen (pierce3@bresnan.net).

CAPSTONE LECTURES: Cathy Conover gave a fascinating capstone lecture in February about her experiences with leadership, especially in the Montana legislature. Denbigh Starkey gave capstone lecture in April on “The life and intelligence of Alan Turing” which was attended by about 150 students, faculty, and retirees.

To volunteer or offer suggestions for Capstone Lectures, contact Don Mathre (upldm@montana.edu).

MEETING WITH MSU PROVOST
The officers of ARF will be meeting with President Cruzado and Provost Potvin in late July to bring them up to date on ARF and our interaction with MSU.

FY2013 Programs and Projects

The following programs and projects are under development this year. Volunteers are needed. We urge each of you in the MSU retired faculty community – whether faculty or spouse – to consider active involvement on a project team. Retirees, the university, and the community-at-large benefit from ARF projects. We hope you can find the time to contribute to the success of an ARF program. If you are interested, please contact Don Mathre. He can be reached at 587-8666 or 994-5157 or via e-mail at upldm@montana.edu.

PHASED RETIREMENT ISSUES: Several of the ARF officers are developing a document that will be used to clarify issues for those interested in phased retirement. Officers of the Faculty Senate and the AFMSU (the union) expressed interest in developing and promoting a new phased retirement policy for MSU faculty. The object is to make it possible for faculty to retire over an extended period of time (say five years) rather than over the weekend. We intend to interact with several members of the Board of Regents to get their input since this Board will make the final decision on a document. This will primarily involve faculty on the ORP program handled by TIAA-CREF since those of us on the TRS retirement plan must adhere to the rules established by TRS.

POST-RETIREMENT CONTRACTS AND ISSUES: If you are under the TRS system, there are some very specific figures about what can be earned on a post-retirement contract but it is very unclear about post-retirement contracts for those on the ORP program handled by TIAA-CREF. There are
even some unclear aspects about post-retirement contracts for those on TRS. We will be working with the folks at the U of M on this since any change in policy would be university-wide.

**BENEFITS AND PRIVILEGES:** Montana State University provides certain benefits and privileges to emeritus faculty members so that they can continue to be active in university and professional activities and to maintain a healthy body and brain. We are working to bring the MSU benefits and privileges in line with those that pertain at many other universities, including the Univ. of Montana. Discussions on this will occur over the coming months.

**PROFESSIONAL ACTIVITY SURVEY OF RETIRED FACULTY:** 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 organizations that use their professional knowledge and experience. Post-retirement professional contributions might be within the university or outside of the university. It would be useful for ARF to document the extent of professional activity and the associated benefits to the university, state, nation, and profession. For this reason, ARF plans to conduct an informal survey through its newsletter. Please participate when the survey announcement is published. In a similar survey conducted three years ago, ARF was able to document the huge community volunteer effort contributed by retired MSU faculty.

**MENTORING:** There is an increasing need for mentoring of students, graduate students, and new faculty. ARF would like to become more involved in such activities. If you might be interested, contact Don Mathre at 994-5157 or via e-mail at upldm@montana.edu. And stay tuned for more information as this program develops.

**Information for MSU retired faculty**

**Officers:** Pierce Mullen has assumed the office of President of ARF beginning July 1, 2012. John Jutila is Past-President.

**ARF OFFICE – 338 Culbertson:** The ARF office is on the west side of the hall on the far north end of the third floor of Culbertson. There is a key box near the door. You can get the PIN from any ARF Officer. To enter the office, punch “clear”, the PIN, “open”. Follow the same procedure to replace the key, which you do before entering the office. The ARF phone has voice mail; call 994-7730. The office contains two computers, but only one is on the internet. For the main computer, the user name is ARF and no password is required. There is WiFi access in the room in case you want to work on your own laptop computer; click on MSU-Guest or RF-Connect to gain access to the internet. If you have an active campus account, the MSU-Guest server will prompt you to logon to that account. Please feel free to use the ARF office for meetings, project work, writing, counseling students, etc. There is a log book on the coffee table. Please help us keep a record of office usage.

**WEB SITE:** Dwight Phillips has worked hard to maintain and expand our web site at www.montana.edu/retired. On the “Links” page, he has added some sites of interest to our group and to retirees in general. The first, under current items of interest, is to a publication that talks about retiree centers on university campuses and the role they can play. Two other links are further down the page under the section “links to retired faculty organizations” and include new links to the UC Berkeley Retirement center. The other link is to the Rutgers Retirement group which is unique in that it seems to have links to a lot of advice on end-of-life issues, like wills, obituaries, planning, etc.

**DUES:** Dues for 2012-2013 are being accepted. As a reminder, dues are $15 for regular membership; $25 for a sustaining membership; $50 for a contributing membership; $100 to become a benefactor;
and $200 for a lifetime membership. Mail your checks to the ARF treasurer, Don Mathre, 731 South 12th Ave, Bozeman, MT 59715. Make checks payable to the MSU Association of Retired Faculty.

This is the 8th edition of the BowWow Times
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