



# *Emeriti Center Newsletter*

Celebrating 27 Years

Since 1978

## THE FUTURE OF THE USC RETIREE COMMUNITY

Greetings from the  
Executive Director!

What an exciting time for USC  
Retirees!

A new collaborative effort, new  
strategic plan, new leadership —  
all while maintaining continuity  
with and respect for the past!

As you read this special edition  
newsletter from the four major USC  
retiree organizations, and the draft  
of a strategic plan enthusiastically  
supported by USC's Executive  
Vice Presidents, we hope you are  
able to join in the excitement and  
enthusiasm we have begun to ex-  
perience. All of us may only have  
begun to understand the construc-  
tive impact an active and vital USC  
Retiree Community can have.  
More ideas and help are needed.

Please participate in our Retreat  
on September 8 when we deepen  
and extend our work on this prom-  
ise.

Betty Redmon,  
Executive Director (outgoing)

It is an honor to join the distin-  
guished members of the Emeriti  
Center and begin to build upon  
your good work! In the year ahead,  
I hope that you will visit, call, and  
email your ideas and concerns so  
that we can move forward with a  
positive vision. We have enormous  
potential for enhancing current Em-  
eriti Center programs in addition to  
providing valuable services for  
USC and the community at large.

Janette Brown,  
Executive Director (incoming)

During the 2004/05 academic  
year a dozen USC retired faculty  
and staff, working together as the  
Joint Committee of the USC Retiree  
Community, developed a potential  
strategic plan expressive of the  
strengths and opportunities of our  
community. Much has already  
been accomplished. USC has de-  
veloped perhaps the most extensive  
and textured network of retiree or-  
ganizations, services, and opportu-  
nities of any major U.S. research  
university. Yet, that success of the  
last fifty years basically serves as  
prologue for what we might be now  
capable of doing and contributing.  
Our community may represent the  
single largest – and still largely un-  
tapped – resource for the continuing  
development of USC, and certainly  
for further enriching the array of  
opportunities and experiences avail-  
able to USC retirees.

We completed a draft of that  
plan earlier this year (a copy is en-  
closed). We invite you to read it,  
reflect on it, and to pass along other  
ideas and suggestions (to any of the  
authors who are shown at the end of  
the document). We have subse-  
quently discussed its possible im-  
plementation with a wide array of  
persons within the University in-  
cluding many in our retiree commu-  
nity. We have been surprised at  
how much encouragement and how  
many additional good ideas have  
come forward. Each University  
Senior Vice President, for example,  
has indicated not only strong sup-  
port for what we are working to  
accomplish, but each has also iden-  
tified other powerfully good ideas

that we had not yet considered.

So, with the support and leader-  
ship of the Emeriti Center, the  
RFA, the SRA, and the Emeriti  
College it has become clear that it is  
now time to review the full set of  
ideas already identified along with  
those that arose in our subsequent  
consultations and others still which  
might now for the first time be visi-  
ble. We now need to sharpen our  
focus on those ideas which should  
be given priority and to initiate ac-  
tion on their implementation. It is  
clear that these choices should be  
ones which seem promising enough  
and important enough to warrant  
our work as members of the retiree  
community in implementation this  
coming year.

To initiate this, a leadership re-  
treat of the USC Retiree Commu-  
nity is taking place on September 8.  
If, after you have had a chance to  
review the strategic plan, you see  
this as something that you could  
and might enjoy helping to shape  
and implement in the coming year  
we would love to extend an invita-  
tion to you to participate in this full-  
day retreat. Please give Ms. Gloria  
Reyes at the Emeriti Center a call  
(213-740-8921) and she will get the  
retreat agenda and details out to  
you. This is an exciting, important,  
and fundamental set of opportuni-  
ties, and we look forward to work-  
ing with you and keeping you in-  
formed as the year proceeds. —

**Bob Biller**

## THE FUTURE OF THE USC RETIREE COMMUNITY (CONTINUED)

Betty Redmon announced last year that she wanted to step down as Executive Director of the Emeriti Center. With the help of the Provost's office, the position was broadly announced and a search committee met over the last few months. The most excellent candidate (unanimously recommended by our committee) accepted Provost Nikias' offer. Dr. Janette C. Brown becomes the new Executive Director of the Emeriti Center at the end of August.

Janette Brown has had excellent experience as the Associate Director of the USC Experiential Learning Office in the Student Affairs Division's Office of Career Planning and Placement Center. She founded this office in 1999 and currently manages the grant-funded USC Freeman Fellows Internship Program as well as the USC Mexico Summer Internship Programs. A graduate of Whittier College, Janette earned her doctorate from the USC School of Education in Higher Education Administration. In addition, Janette has business experience having owned and operated a real estate firm with her husband for over 25 years. The retired faculty and staff of USC are fortunate to have this very gifted colleague beginning her work as the Emeriti Center's new Executive Director. With support from Provost Nikias, Janette will also become the first full-time Executive Director. Let's all warmly welcome Janette to her new responsibilities. —**The Emeriti Center Executive Director Search Committee**

The Emeriti Center is undergoing some changes in its staff and in its mission regarding the retirees of the University. As a way of introducing new staff members and volunteers, this section of the newsletter will outline their vision and hopes for upcoming years. Jennifer Ontai assumes a new role as Assistant Director of the Emeriti Center, and Judy Diaz is now the Assistant Director of the Emeriti College, while Bob Scales replaces Bill Faith as the Director of the College. Bill will continue to consult on special projects for the Emeriti Center. Gloria M. Reyes, formerly of Pasadena Hospice, is now the Retiree Relations Coordinator. Bob Biller has taken on the role of Associate Director of Development and Mitzi Tsujimoto is Associate Director of Administration. Bob Coffey and Carole Gustin, presidents of the Retired Faculty Association and Staff Retirement Association, respectively, are also Faculty and Staff Liaisons to the Emeriti Center. Joan Mason continues to oversee the Emeriti Center's financial affairs, and Mike Halloran remains Associate Director of Telecommunications.

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Two years ago the Emeriti Center celebrated the past with a silver anniversary luncheon and premier of a DVD featuring USC retirees. We now celebrate the future with a proposed strategic plan that outlines greatly expanded possibilities. Those of us who worked on this draft believe that if we can bring this vision into reality, USC will embrace its retirees with deepened respect. We need you to bring focus and energy to the larger vision and give action to ideas. Please help set the course of our future together by participating in the USC Retiree Retreat on September 8<sup>th</sup>.

— **Betty Redmon**

At our advanced age (60's through 100's) one might think that we would not be too concerned with innovation or changing things. That is not the state of mind I've found in working with USC Faculty and Staff retirees. We can see many ways to improve our retiree organizations' operations and provide better service to each other, the community, and USC. I look forward to our working together to implement our Strategic Plan and create the future for the USC Retiree Community.

— **Robert R Scales**

The Emeriti Center administration and staff have been working collaboratively with the Staff Retirement Association and the Retired Faculty Association for planning and facilitating services and programs for a more cohesive retiree community. The dedicated efforts of the SRA and RFA have resulted in a more collegial environment between staff and faculty. The hope is to build on this collegiality for the enhancement and greater contribution to the USC retiree community and to benefit the University.

A joint committee of the Emeriti Center administration, staff and faculty retirees developed a plan to identify the future goals of the USC retiree community. To discuss,

develop and implement these plans, a leadership retreat is planned for September 8. Vast and valuable experiences and knowledge of the retirees are presently under-utilized. The purpose and hope of the retreat is to demonstrate the strength and opportunities retirees can continue to contribute to the University and Trojan Family. Join us on September 8.

—**Mitzi Tsujimoto**

The Retired Faculty Association is experiencing change and challenge. It is joining with the Emeriti Center, Emeriti College and Staff Retirement Association to integrate some of its activities and resources in ways that will benefit us all. We developed a strategic plan that offers exciting possibilities for increasing our ability to serve and be supported. Our challenge is to join together in actively developing and implementing the ideas already and yet to be generated. Our collective success is dependent upon individual engagement. Please join us to strengthen our ability to gain support and to give service to our own members, to USC, and to the broader community.

— **Bob Coffey**

This year presents new ideas and programs for the USC Retiree Community. We hope to implement some activities discussed in the strategic plan, while adapting it to the changing needs and interests of our "Trojan Family" retirees.

We plan more joint activities between staff and faculty. We'll get to know each other and how, under the umbrella of the Emeriti Center to retain our individual identities while using our combined strengths for mutual benefits.

Let's work together to discover how to successfully meet common goals. I look forward to serving as SRA President. Please attend the retreat on September 8. Help shape the future of the USC Retiree Community.

— **Carole Gustin**

**STRENGTHENING USC THROUGH THE ACTIVE CONTRIBUTIONS  
OF THE USC RETIREE COMMUNITY**

**A Strategic Plan  
Developed by the Joint Committee of the USC Retiree Community**

**Prefatory Statement**

This strategic plan is being developed by a joint committee of the USC Retiree Community representing the Emeriti Center, the Emeriti College, the Staff Retirement Association, and the Retired Faculty Association. In the fall of 2004 we undertook to explore what we can do that is both worthwhile and practical to strengthen the University. Accordingly, the following blueprint has been developed.

This blueprint follows along the track of the University's strategic plan announced by President Sample earlier in the fall. Recognizing the realities that confront the University, this strategic plan of the Retiree Community seeks to support the role and vision of USC, and to further the themes of interdisciplinary lifelong learning, strengthening our Pacific Rim connections, technology transfer, and collaboration with other institutions.

The planning has proceeded in the context of the celebration of the University's 125<sup>th</sup> anniversary, in which all of us are encouraged to think about how we can honor the past in ways that help and inspire the future. Therefore, this USC Retiree Community strategic plan is organized into three sections. First, it focuses on *honoring the past* by reviewing what retirees have done through the four separately organized components of the retiree community. Then it turns to exploring what might be worth *inventing in the future*. It concludes with steps that might be taken to *implement* this enlarged picture of the future.

Our planning is predicated on several basic and closely related facts. One is that the investment in the University that was made during their years as faculty or staff members of the University, continues into retirement in the same way that students move seamlessly from student status to alumni status; they all continue as vital components of the Trojan Family. Another is that although retirees during their working lives were identified with separate disciplines and academic fields in particular schools, departments, colleges, or administrative support organizations, in retirement such barriers are transcended and retirees become part of a community that is *principally* directed toward the advancement of the University as a *whole*.

This paper outlines our thinking about the strategic contributions of the USC Retiree Community that support the University. We expect our planning to continue to evolve as we learn more from consultation both within the Retiree Community and the larger USC community, and as we explore the resources that would be warranted by these developments.

## HONORING THE PAST —

### BUILDING ON OUR STRENGTHS

USC, recognized as offering the largest scope of services by and for retirees of universities in North America, is deeply cognizant of the value that results when retired faculty and staff continue *life-long and world-wide* connections with, and support for, the institution they helped to build and the community of which this University is an integral part.

#### Organization

The history and character of USC have been shaped by the faculty and staff over the last 125 years. Throughout their careers, faculty and staff have elected to work in this educational/service organization rather than in industry where salaries in most instances would have been considerably higher, thus effectively making them the largest contributors of all to USC. And many, after retirement, continue to serve the University on campus and as ambassadors to the community. Just as the Staff Assembly and Staff Club were unique pioneering ventures, so the USC Retiree Community, with leadership drawn from the four discrete organizations, is forging new ground in university-retiree relationships.

These organizations are:

- Retired Faculty Association (since 1949)
- Emeriti Center (since 1977)
- Staff Retirement Association (since 1985)
- Emeriti College (since 1990)

Each of these organizations began independent of the others; each has largely pursued its own portfolio of contributions to the University and services to its members. On balance, these contributions have been complementary and not competitive. A spirit of support and encouragement and cooperation prevails among all four as hundreds of retired staff and faculty volunteer time, talent, and money to carry out the separate or joint activities of these organizations.

As of January 2005, the USC Retiree Community consists of 1,495 Gold-Card recipients who individually have served the University for at least 10 years. This group of retirees represents more than 30,000 years of service to the University, with an individual average of 20.9 years. To these numbers may be added many retirees whose shorter period of service or age at retirements render them ineligible for the Gold Card but who nevertheless remain actively involved and connected with USC. It is also noteworthy that among the retirees are many alumni who bring an added dimension of loyalty and support to their alma mater.

Over the last half century, USC has gradually created the key components of the Retiree Community that nurture the contributions of retirees to the University, albeit that each of the four organizations provides some different services and opportunities.

Given that each of these organizations works well in its separate sphere, we see no reason for structural change, merger, or incorporation. However, we have learned that there are a number of important things worth doing that transcend our four present charters. The USC Retiree Community accordingly would benefit from collaboration, and such collaborative action would work strongly to the advantage of the University.

#### Achievements

Last year, the **USC Emeriti Center** celebrated its 25<sup>th</sup> anniversary with a corporate-sponsored luncheon and premiere of a professionally produced documentary “Connecting for Life.” This DVD was subsequently shown at national conferences: American Society on Aging, National Council on the Aging, and Association of Retirement Organizations in Higher Education (AROHE). It appears on the USC Website with links from several organizations. The Center’s national reputation derives both from consistent growth in opportunities accessible to retirees to serve the university, the community, and each other, and from expanded services offered to retirees. Some of the services provided by USC retirees to the university and the community are noted in this plan.

The activities and services of the Center are wide-ranging. Direct services to retirees include pre- and post-retirement education (seminars, application forms, articles, personal consultations, Steps-to-Retirement Booklet); regular communication (via newsletters, EC Forum list serve, website, e-mail, internet service, personal notes, phone calls, etc); referrals for age-related and other personal problems; and service as ombudsman for USC-related problems. USC offers many privileges to qualified retirees through the Retiree Gold Card (such as campus parking, publications, e-mail, directory, discounts, event calendar, etc) and to other retiree groups (such as retention of eligibility for tickets to athletic events and membership in the University Club). USC’s primary support is through its generous Defined Contribution Retirement Plan and the Support Staff Pension Plan. Many retirees also receive a university healthcare stipend.

Through foundation support, the USC Emeriti Center offers Emeriti Research Grants of \$2000 each (resulting in dozens of academic publications) and Undergraduate Assistantships of \$2500 to aid in retiree research (resulting in publications and significant influence on student participants). A new offering of Volunteer Community Service Grants of up to \$1000 encourages volunteerism on- and off-campus.

Recognition of achievement, contribution, and service often becomes even more meaningful in retirement. The Emeriti Center administers the Leibovitz Faculty and Staff Awards for Service to Seniors and the Borchard Honorary Lectureship, and collects nominations for the Lifetime Achievement Awards. "Retiree Recognition" is a regular page of the newsletter featuring the achievements or activities submitted by retirees. Successful nominations were made on behalf of retirees for Alumni and civic awards. The Emeriti Center-sponsored H. Dale Hilton Living History Project provides video-taped interviews with prominent USC retirees for the USC Archives, the USC Library, and serves as a resource for the 125<sup>th</sup> Anniversary History Group.

In 2004, the Emeriti Center was presented with the Small Business Recognition Award from the USC Small Business Development Office.

The Emeriti Center Advancement Board, formed in 2002, serves as an added connection to the corporate and alumni communities.

USC Emeriti Center has been referred to as the "gold standard" [for retirement organizations in higher education] in an article in the *Chronicle of Higher Education* (Feb. 7, 2003). Emeritus Director Paul Hadley was the subject of an article entitled "Professor for Life" in AARP:NRTA's publication *Live and Learn* (Winter 2003). A dual case study of the USC

Emeriti Center and the Retiree Center at UC Berkeley, authored by the respective directors and entitled "Continuing the Connection: Emeriti/Retiree Centers on Campus," has been accepted for publication in the peer-reviewed journal *Investigative Gerontology* (2005). Based on an interview already conducted, the USC Emeriti Center is to be featured in the most prestigious *London Times Higher Education Supplement* (2005).

Other AAU universities including Yale, UC Berkeley and UCLA have sent representatives to consult with the USC Emeriti Center Director on how to form or enhance a retirement center at their institutions.

USC is the force behind the founding of the Association of Retirement Organizations in Higher Education (AROHE) in 2002 and serves as its founding and present secretariat. Evolving from a fifteen-year span of USC Emeriti Center-sponsored conferences with retiree organizations at other universities, first in California, then the West Coast, and finally spanning the country, AROHE is now an international organization in its infancy. Yielding immense benefit to member universities, its very existence is still dependent upon the volunteer leadership of USC.

**The Emeriti College** (a division of the Emeriti Center with volunteer faculty of 75 retired and senior USC scholars) fosters regular *university teaching* opportunities with a variety of academic units (courses, freshman seminars, guest lectures). Emeriti College faculty reach out: *to individual students* (mentoring of Emerging Leaders and Caldwell scholarship recipients and giving undergraduate assistantships on retiree research projects); *at campus events* (Borchard Lecture, Inamoto Lecture); *to alumni* (alumni club lecture series, Trojan Travel tours and cruises); *to the business community* (lectures to civic/non-profit groups and at the Los Angeles City Library, "Talking Together" discussions at corporate events); and *to seniors in the greater Los Angeles area* (at senior centers and retirement residences). Last year 140 programs were presented at two-dozen community sites, reaching more than 10,000 participants. This community outreach, the hallmark of the USC Emeriti College, has largely replaced the former USC Speakers' Bureau and has given the Emeriti Center and USC the title among retirement organizations in colleges and universities as the "Community Model."

**The Retired Faculty Association (RFA)** hosts bi-monthly program luncheons and an annual Provost's Luncheon for New Retirees, and maintains communication with retired faculty through its newsletter. An RFA emergency relief fund is available for needy faculty retirees. The RFA supports one Caldwell Scholar and helps administer the program. It also selects recipients for the USC Lifetime Achievement Awards conferred at USC's Annual Academic Convocation.

**The Staff Retirement Association (SRA)** provides quarterly program lunches and an annual Retiree Recognition Luncheon hosted by the Senior Vice President of Administration, sponsors guided tours of Los Angeles attractions, sends birthday and anniversary cards to its members, and maintains communication through a monthly e-newsletter and annual publication.

The **RFA** and **SRA** share a homecoming booth welcoming all retirees, and all retirees are invited to join the Retiree Book Club's monthly meetings. Efforts are underway to determine more successfully the needs and interests of USC retirees.

## Values to USC

Together our four units have helped to create a caring environment for senior members of the USC community. Now we want to expand our horizons to create an environment and expectation of substantial support aimed toward strengthening the University as a whole. From more than fifty years of experience, we have learned what the Retiree Community can accomplish

- 1. Institutional Continuity.** The Emeriti Center's Living History Project records video interviews dating from the era of President Norman Topping. Surveys collect retirement memories, experiences, and impressions. Regular social, intellectual and cultural gatherings are an untapped resource.
- 2. Morale and Community-Building.** Highly respected honors and recognition, continual communication, and compassionate services are key components. Outstanding retirement benefits and meaningful retirement privileges, like the Retiree Gold Card, are respected and fundamental.
- 3. Service to the University.** A substantial resource of unpaid service, retirees constitute a pool of experts who remain on or return to campus to serve in innumerable capacities: from time to time they help out in emergency situations and cover staff and faculty shortages; help orient and consult with new staff and faculty, providing advice and counsel when it is sought; they teach courses, lead freshman seminars, guest lecture; they maintain contact with alumni and provide expertise on alumni tours. They are productively engaged in research, publication, and mentoring students, not infrequently employing undergraduates to assist with research projects, thereby helping to mold some of USC's finest students; they are involved in project development, strategic planning, accreditations preparation, doctoral supervision, and numerous other committees. Retirees identify and develop outside resources for USC and encourage donor gifts.
- 4. USC Ambassadors.** Retirees are USC ambassadors with more than 10,000 contacts each year. Between 140 and 200 college-level lectures/discussions are given to local seniors, alumni, and business people. Volunteers work in libraries, schools, churches, hospitals, polling centers, meals-on-wheels, National Red Cross, and other public-service agencies. With the exception of the Emeriti College lectures, most volunteer service by retirees, whether on campus or in the community is undocumented.
- 5. Donor Pool and Development Resource.** Retirees provide the strongest link to alumni, donate to the university through direct and planned gifts, encourage individual donors and foundations with which they have links, to consider USC. Data for the last 20 years show that as of January 2004, 1,591 retirees have made 65,571 gifts to USC both before and after their retirements, for a total of \$16,583,747.84. There have been countless contributions to USC resulting from the direct efforts of retirees—including one endowed position this year from a new donor who responded to the request of a retiree.

## INVENTING THE FUTURE –

### THE USC RETIREE COMMUNITY

The USC Retiree Community wishes to celebrate USC's 125<sup>th</sup> Anniversary with the introduction of some innovative initiatives for the future of the University, its faculty, staff, and especially for those who have retired from full-time service from USC.

The aim of these initiatives is to link and connect with retirees based on what they are doing *since retirement* and want to do in the *future*. The initiatives are designed to make a contributions to the greater Trojan Family, of which the retirees are an essential component. The USC Retiree Community is ready to begin their implementation as resources are available and interested persons are identified for leadership. Indeed, the Retiree Community is optimistic about realizing the vision of what can be achieved on behalf of the University and its retirees.

#### 1. **Enhance and Expand the Programming and Communications** of the USC Retiree Community to:

- **Improve the USC Retirement Process** by providing personal contacts between retirees and active personnel to discuss and answer questions about retiring from USC and about retirement in general.
- **Strengthen Communication and Connections** with and among retirees, current faculty and staff, university administration and the public including such vehicles as surveys, newsletters, university publications, and list-serve discussions that explore current and future issues and collaborate to solve problems.
- **Begin Involving New Faculty and Staff to Think of Service to USC as a Life-Long Connection:** through orientation sessions and literature, discussions, and seminars covering what is important to consider in one's career that leads to a successful retirement.
- **Enhance Programming for Retirees and Those Planning Retirement** through luncheons, lectures, discussions, seminars, demonstrations, classes, etc. covering retirement issues and important life and living issues. Form walking groups, computer helpers, or other activity groups similar to the existing Retiree Book Club.
- **Initiate a USC Retiree Service Corps** to seek, generate, collect, share knowledge of, facilitate, and train for service opportunities – as well as document, measure, report, and build ways to recognize the service contributions of USC Retirees, both within USC and in the broader community. What USC retirees are already doing is formidable, but the impact of those contributions could benefit from more network linkage, recognition, and support. USC can benefit from the community recognition this could generate. The Retire Community might be able to prototype a broader University signature by recognizing the impact of such service contributions being made as well by our current students, staff, faculty, alumni, and other USC community members to a higher quality and more humane and civil society.
- **Build on the Successes of the Emeriti College** with an expansion of services and goals, such as creating a curriculum for retiree leadership that would involve practical applications to meet a wide range of community needs and interests. Expand the new program "Talking Together" in which USC Emeriti engage in discussions with corporate groups on vital issues. Develop new projects that more broadly address the community.
- **Improve Institutional Connections and Support.** Identify additional privileges and services to add to email, personal website, life-time parking, library usage, listing in the directory, tickets to campus events, health stipends, campus housing for retirees, etc.
- **Expand Programming by the Retirees.** Find ways to engage retirees in giving demonstrations, exhibits, discussions, and other formal and informal presentations among themselves and to the public.
- **Work with USC Non-local Retirees,** both domestic and foreign, to assist in University work such as student recruitment, alumni group formation, ongoing contact with students and their families, and overseas ventures.
- **Find Effective Ways to Engage Non-local USC Retirees** through programming that facilitates their involvement. This may require conference phone meetings, e-mail correspondences, and preparing and sharing assignments with local retirees.
- **Reach Out and Engage Frail and Non-Active USC Retirees,** creating contact and participation in the greater USC Retiree Community through visitations to those who are less able, so that more can be known about the needs of this population. Seek to address those needs. This may lead to such things as a phone-tree for the ill or frail; an organized transporta-

tion service to campus for scholastic, cultural, social, or athletic events; and/or extension of services by the Staff/Faculty Counseling Center. Needs may be met by programs sponsored by the USC Retiree Community alone or through collaboration with Alumni or Student Groups, or by referrals to public or nonprofit agencies.

- **Create Video Presentations** to supply programming to Senior Centers and other groups to stand on their own or to serve as backup for speakers who cannot make a scheduled engagement through the Emeriti College.
  - **Create a Performance and Presentation Wing of the USC Retiree Community** that would provide exhibits and performances. The retirees who have artistic and performance talents will form a performance and presentation group that would create exhibits of their artistic work and create productions and performances that would be available as programming to community groups.
  - **Devise Means and Mechanism for Retirees to Assist in Fund-Raising**, to include seminars and working sessions to help retirees: identify potential donors, train in methods to cultivate possible donors, and learn how to work with University units.
  - **Be More Involved as Mentors for USC Students** with a special interest in students who are in need of some attention while continuing to mentor the “Emerging Leaders.”
  - **Contribute to the University Neighborhood Outreach** by assisting with existing programs and creating additional programs such as parent and/or teacher education and mentoring.
  - **Assist the University in the Collection and Management of USC Historical Facts and Items** that will enhance the university archives and assist in the preservation and display of items on hand.
2. **Develop a Long Term Financial Strategy and Structure** to support the USC Retiree Community in the present and into the future.
- **Continue to Support and Encourage Retirees’ Contributions to USC** including time and financial support to scholarships, academic units, and the organizations that support the USC Retiree Community.
  - **Expand Research and Service Grants** to (a) retirees who continue productive research, writing books and articles and in other ways add to knowledge; and (b) retirees whose important roles as volunteers in university, community, or cultural organizations entail some material costs.
  - **Create an Endowment** in the university that will support the future of the USC Retiree Community. The USC Retiree Community and the USC administration should join together in the continuing search for a naming donor who would support a Center for the USC Retiree Community.
  - **Develop a Strategy to Nurture** the USC Retiree Community in building and accomplishing common goals. Seek funding from all types of sources for general operation and special projects. Find the common goals for all USC organizations that make up the USC Retiree Community and seek to raise funds for those causes.
3. **Support the University in Building Facilities to Consolidate and Accommodate the Work of the USC Retiree Community.** Integrate the needs of the USC Retiree Community into the needs into University Facilities planning.
- **Include in the Center Facility** administrative offices for AROHE and the USC retiree organizations, meeting spaces, and space in which to read, write, and work on computers.
  - **Create a Multi-Generation Living Facility** that would have space for USC Retirees in University housing that would include faculty and students.
4. **Devise Unique Possibilities** for the USC Retiree Community that would show its continued leadership and vitality as a Retirement Community.
- **As a Group Participate in Research Studies**, especially as related to geriatric issues. Seek to be more involved with USC programs that involve studies of the aging, active adults, family relations, volunteering, community activism, mental and/or physical traits, etc.

- **Find Ways to Better Connect with USC Alumni** organizations and activities, both domestic and foreign.
  - **Inform and Empower the Retiree Community in Their Roles as USC Ambassadors.** Provide training sessions, materials and information that will better equip the Retiree to be informed as a representative to speak about USC.
  - **Encourage Involvement of Non-Local Retirees** through such devices as conference phone meetings, e-mail correspondence, partnering with local retirees in developing and implementing assignments.
  - **Work with Domestic and Foreign Non-Local USC Retirees** to assist in University tasks aimed to recruit students, form alumni groups, maintain ongoing contacts with students and their families, and aid in overseas ventures.
  - **Collaborate with Our Colleague APRU Institutions**, share common experiences and mobilize our joint capacity as retiree communities to support our research universities.
  - **Provide Strong Leadership in AROHE** as the international association home office housing the AROHE Executive Director and Founding President. Through USC connections seek to enlarge AROHE's membership to include all universities with existing or developing retirement organizations. Host an international conference.
5. **Redesign the Center for the USC Retiree Community** to better serve and engage the full population of individuals who have retired or will retiree from USC. The following steps will be explored:
- **Reinvent the Center** to be more inclusive, expanding the definition of "retiree" and incorporating the common goals of the Retired Faculty Association, Staff Retirement Association, and Emeriti College. Transcend previous alliances with these retiree organizations by providing support, as arranged for each organization, and coordinate joint efforts that serve the entire USC Retiree Community.
  - **Begin New Initiatives** to improve existing programs and create bold new projects for the USC Retiree Community.
  - **Organize the Center's Operations** -- staff, committee structure, councils, and related boards -- to best address the initiatives for the future. The Center that serves the USC Retiree Community should be a full-time office with a full-time professional staff in appropriate positions.
  - **Seek Ways to Consolidate Efforts** of all the Retiree Organizations, including publication of newsletters, management of databases, collection of dues, solicitation of support, and involvement of retirees.

### **IMPLEMENTING THE OPPORTUNITIES BEFORE US**

We have reflected on USC's achievements with its Retiree Community and have identified a number of attractive and practical opportunities that learning makes possible. This section suggests how we can begin.

#### **The Evolving Plan**

A significant finding resulting from this preliminary development of the strategic plan is that there is the remarkable opportunity now available for the several institutional parts of a vigorous USC Retiree Community to collaborate and contribute to the University of Southern California's realization of its goals. The Emeriti Center, The Emeriti College, the Staff Retirement Association, and the Retired Faculty Association are all convinced that our collaboration with each other and with other academic and administrative units offers a *major* opportunity for strengthening this University of which we are an intrinsic part. We are aware that we need to work together with greater skill and suppleness—and the Joint Committee preparing this plan in itself is a model of how we can most effectively and productively proceed. A key lies in our recognition that we can facilitate achievement of our mutual goals by working together in our common interest: the effectiveness of the retirees and the benefit of USC. We do not anticipate closure of any of the organizational parts of the Retiree Community; rather we see that each would be animated and energized by the larger vision foreseen in this strategic plan.

It is clear that those of us in the Retiree Community will contribute the laboring oar to guide this plan and begin its implementation. Rather than expending all our energy in trying to "perfect" a plan, it seems better to realize that our thinking about what might be potentially desirable should be disciplined by what we learn can be achieved by our actions. We are aware that we cannot

achieve all our goals at once, but that we can learn as we proceed, that we need to work our way into the larger potential that this strategic plan addresses.

We anticipate using the Joint Committee as a continuing forum, its membership enlarged as we progress, with focus on developing experience, prioritizing, testing, and acting to implement the ideas developing in the strategic plan.

As completion and submission of the Strategic Plan evolve, we expect to begin the process of implementing some of the key elements it contains. The first step will be to identify a small number of priority projects around which an implementation committee can be organized and with which a champion of that development can work. Implementation teams will assess needs, develop program(s), enlist retirees, and create funding strategy. The licensing and progress will be nurtured and overseen by the Joint Committee, and reported to the larger community.

### **Resources**

The resources and encouragement for innovation provided by the University to the USC Retiree Community have been substantial and are very much appreciated – both by each of us individually as well as by the community as a whole. The opportunities identified within this strategic plan are substantial. We need also to consider whether these opportunities warrant the investment of additional resources, and if so, the possible sources and nature of these resources.

**Manpower.** The significant accomplishments of the Retiree Community to now have been achieved by the active support and participation of approximately one fifth of the USC retirees and by financial support of many more. Volunteer time on campus is grossly under-recorded at 3,133 hours for FY2004. However, implementation of this strategic plan requires the enlistment and involvement of many additional volunteers—retirees currently active, those able to be physically present, those by frailty or distance or personal constraints unable to come to campus. We believe that, the potential exists to increase significantly the number of participants and the contributions they make.

**Funding.** How much has been accomplished by a minor financial investment from the University is noteworthy. Support for the USC Retiree Community in FY2005 is \$218,000. To fund adequately only the existing programs of the Emeriti Center and the AROHE (Association of Retirement Organizations in Higher Education) office, it must raise an additional \$100,000 each year, a target seldom reached heretofore. Funds are solicited through an annual campaign to the retirees themselves, foundation grants, and corporate sponsorships. Endowment funding remains an unrealized ideal.

A *big* vision necessitates rethinking of funding support: a volunteer force requires adequate staff support, and new programs rely on material resources. An increasingly spread-out campus demands additional transportation considerations.

Full implementation of this plan requires a true investment partnership between USC and the USC Retiree Community.

*Prepared by the USC Retiree Joint Committee:*

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Mitzi Tsujimoto  
Ronald Violette*

Endorsed by:  
USC Emeriti Center  
USC Emeriti College  
Retired Faculty Association  
Staff Retirement Association

# Emeriti College

The Emeriti Center welcomes Dr. Robert Scales, former Dean of the USC School of Theatre as the new Director of the College, and Ms. Judith Diaz, Assistant Director. Ms. Diaz has been with USC for over 14 years and formerly directed the Continuing Legal Education Programs at the USC Law School.

This summer has been quite busy for the Emeriti College; more than 25 lectures were scheduled at various locations, including Oasis Westside, Oasis at the Harbor, Oasis in the Valley, Foundation for the Junior Blind, LA Breakfast Club and Sunset Hall. We thank our distinguished group of faculty who graciously gave of their time and expertise.

The College is also updating the *Emeriti College Speakers Directory* which will be presented to all the various sites in the community and which will facilitate in booking the lectures. A new Access database was created, where each speaker, topic, and site are assigned a number. This allows us to manipulate data and facilitate database maintenance. Thank you to Dr. Scales for his direction and expertise in this area.

We welcome all retired faculty and staff to join us in lecturing in the community. For further information, please contact Judy Diaz at (213) 740-8841 or e-mail at judydiaz@usc.edu.

Fall Schedule to Date:

## Oasis Westside

*Westside Pavilion 10730 West Pico, corner of Overland;*

*Robinsons-May, 3rd Floor*

*Parking: Overland entrance, follow Robinsons-May signs to roof. Walk directly into OASIS.*

Victoria Neal, Director (310) 446-9472

**Thursday, 10:30 a.m.**

*October 06, 2005* Vasisht K. Malhotra  
Buddhist Philosophy

*October 27, 2005* Robert Penny  
Endocrine System (The Internet of The Body)

*November 03, 2005* Peter Berton  
Indo-China Update I

*November 10, 2005* Peter Berton  
Indo-China Update II

*November 17, 2005* Robert Penny  
DNA (The Instruction Manual For All Forms of Life)

*December 01, 2005* Gunnar Nielsson  
The Attempt to Reform the U.N. Security Council

*December 08, 2005* Gunnar Nielsson  
The Debate about Approaches to International Human Rights: the Responsibility to Protect

## Oasis In The Valley

*Los Angeles Pierce College*

*6201 Winnetka Avenue, Woodland Hills, CA 91371*

Dawn Muroff, Director (818) 267-4875

**Wednesday, 10:30 a.m.**

*October 17, 2005* Thom D. Mason  
Jazz From A to Z: What is It?

*November 9, 2005* Edward Schneider  
The Best Alternative Treatments and Supplements

*November 16, 2005* William R. Faith  
Where are the Popular Oracles in American Humor?

*November 23, 2005* Robert Scales  
Why Does Live Theatre Stay Alive?

*November 30, 2005* Karen Lansky  
The Art of Goya, Modigliani and Chagall I

*December 07, 2005* Karen Lansky  
The Art of Goya, Modigliani and Chagall II

*December 14, 2005* Karen Lansky  
The Art of Goya, Modigliani and Chagall III

## Oasis At The Harbor

*Harbor Terrace Retirement Center*

*435 West 8th Street, San Pedro, CA 90731*

Althea Clark, Director (310) 547-0090

**Tuesday, 1:30 p.m.**

*September 20, 2005* Robert Penny  
DNA (The Instruction Manual For All Forms of Life)

*October 11, 2005* William R. Faith  
Media and War

*November 15, 2005* Ruberta Weaver  
The Revival of Storytelling as a Mode of Cultural Preservation

## Oasis Lakewood

*Robinsons May Basement*

*5100 Lakewood Boulevard, Lakewood, CA 90712*

Monica Dunahee, Director (562) 601-5041

**1:00 p.m.**

*Thursday, October 13, 2005* Vasisht K. Malhotra  
Contemporary Afghanistan

*Tuesday, November 15, 2005* Paul W. Knoll  
East European Update: NATO and the EU

USC Emeriti Center — Emeriti College

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[www.usc.edu/org/emeriti\\_center](http://www.usc.edu/org/emeriti_center)

*Service and Learning*

# Emeriti Center

*Retired Staff and Faculty*

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