

Introduction

This chapter provides an overview of the University of Southern California's (USC) legacy programs that enhance faculty transitions to and through the retirement years. These programs help our faculty create their academic heritage, the tangibles or intangibles transmitted to their academic heirs. Legacy projects abound in each of USC's eighteen schools; this chapter focuses on university-wide programs.

The **USC Emeriti Center**, **Emeriti Center College**, and the **USC Living History Project** are the main programs discussed; they preserve, promote or help support the creation of faculty legacies. This chapter explains how these programs evolved, what resources were necessary, and how they play a vital role in USC's culture regarding faculty retirement.

Culture

The University of Southern California has fostered a culture of inclusiveness that values faculty, staff, students, and alumni. This supportive environment enabled the retired faculty to establish the Retired Faculty Association in 1949. Since then, retired faculty have served as visionary leaders and advocates who helped establish the USC Emeriti Center in 1978, the USC Living History Project and retirement transition sessions in the early 1980s, and the Emeriti Center College in 1990.

USC has long strived to build a culture of support. The metaphor we use is the "Trojan Family" to describe the university's population of faculty, staff, students and alumni. The metaphor can be used to describe USC's culture of reciprocal caring. It promotes a culture of inclusiveness, interdisciplinary collaboration, and partnership. USC also values an entrepreneurial spirit where all ideas are welcome and interdisciplinary approaches are promoted. Many opportunities exist to secure resources for good ideas. This, in turn, enables professors to leave a legacy in many different ways.

Retirement Support

Our legacy programs can succeed only because they are built on a firm foundation of retirement support. USC supports faculty before, during and after retirement enabling faculty to more easily create legacies for future generations. USC supports include:

- Income Support
 - Provides a matching contribution up to 10 percent of faculty members' salaries for their retirement accounts
- Information
 - Offers transition-to-retirement seminars since the early 1980s explaining retirement options, Social Security, Medicare, legal and estate planning, and programs/services through the USC Emeriti Center and Emeriti Center College and the Center for Work and Family Life
- Continuation in the Academic Community
 - Has a policy (one of the first in higher education) allowing faculty to work for up to three years at 50 percent time with full benefits as they transition to retirement
 - Offers a similar policy encouraging retired faculty to return to service to teach one or more classes, or do research or service, with compensation and assignments (less than 50%) agreed between the individual and the school

- Furnishes an Emeriti Center and USC retiree Gold Card with special privileges, discounts, and services for those who have worked at USC for at least 10 years prior to retirement
- Supports an Emeriti Center College with opportunities for teaching, learning, mentoring and research stipends
- Health Care
 - Makes available USC Senior Care - a “Medigap” retirement health insurance after age 65, offered at cost
 - Provides a supplemental annual health care stipend paid quarterly for those who have worked at USC for at least 15 years

USC Faculty Satisfaction

The American Council on Education’s 2012 Faculty Survey¹ results exemplify USC’s culture of respect for faculty contributions. USC faculty generated the highest satisfaction scores of all institutions surveyed in

- Legacy Programs
- Culminating Projects
- Retirement Transition Counseling
- The Ability to Phase to Retirement
- Planning on Staying Connected with Department and Other Parts of the Academic Community After Retirement.”²

Further examples are found in open-ended survey responses to the question: *What are the best things that your institution does to make the retirement transition smoother for faculty?* USC faculty responses were higher than all institutional responses in the ACE Faculty Survey in two areas:

1. Encouraging/fostering a very active retired community to stay connected to the institution (*All Participating Faculty Nationwide: 3.9%, All Research Faculty Nationwide: 4.4%, USC Faculty: 8.8%*); and
2. Having a retirees’ center for information and programs (*All Participating Faculty Nationwide: 3.0%, All Research Faculty Nationwide: 4.2%, USC Faculty: 19.0%*).³

University of Southern California

History

Established in 1880, USC is one of the world’s leading private research universities and the largest private employer in Los Angeles. It enrolls more international students than any other U.S. university

¹ THE ALFRED P. SLOAN AWARDS FOR BEST PRACTICES IN FACULTY RETIREMENT TRANSITIONS Research Institutions Report for the University of Southern California, Results from the Faculty Survey Conducted in Spring 2012. American Council on Education (ACE)

² Ibid.

³ Ibid.

and offers scholarships to a high percentage of first-generation students. With a strong tradition of integrating liberal arts and professional education, USC fosters a culture of public service and encourages students to cross academic as well as geographic boundaries in their pursuit of knowledge. USC has 18,000 undergraduates, 22,000 graduate and professional students, and 3,500 full-time faculty.

USC's University Park campus in Los Angeles is home to a College of Letters, Arts and Sciences and 17 schools. USC has perhaps the strongest arts programs of any research university, including Cinematic Arts, Music, Dramatic Arts, Fine Arts, Architecture, and our new school of Dance, as well as a classical music radio station and art museum. The Health Sciences campus, northeast of downtown Los Angeles, hosts a School of Medicine, School of Pharmacy, three major teaching hospitals, and programs in Occupational Science, Occupational Therapy and Biokinesiology, and Physical Therapy. USC also has programs and centers in seven California cities and in Washington, D.C.

Service learning, volunteerism, and community engagement are important USC values. The USC *Good Neighbors Campaign*, established in 1993, provides financial support to university/community partnerships with a visible, positive impact on the surrounding communities. Millions of dollars donated by USC faculty and staff all go directly to support these partnerships. USC's *Neighborhood Academic Initiative* (NAI), established in 1989, is a rigorous, seven-year pre-college enrichment program that prepares low-income neighborhood students for admission to a college or university. Those who complete the program, meet USC's competitive admission requirements and choose to attend USC are rewarded with a full four and a half year financial package, minus loans. USC's culture of student community service was recognized in its designation as 2000 *College of the Year* by Time Magazine and the Princeton Review.

USC Emeriti Center

Understanding a university's culture, values, and stakeholders; and engaging respected university leaders (retired or not) as champions for the cause, are the keys to creating a retiree center that can help initiate and foster faculty legacies.

ACE particularly acknowledged the University of Southern California⁴ for its USC Emeriti Center; the USC Emeriti Center College, that sponsors a speaker's bureau, offers small research grants to retired faculty and provides opportunities to teach and attend enrichment courses; the USC Living History Project, that records faculty legacies; and its Trojan Encore program, that promotes part-time work and on-campus volunteer service, leveraging retirees' unique skills and experience. USC also has been instrumental in assisting other universities to improve the retirement experience for their faculty and staff through the Emeriti Center's leadership role in the international non-profit, Association of

⁴ The Alfred P. Sloan Projects for Faculty Career Flexibility - Recognizing and Rewarding Best Practices for Senior Faculty: 15 Institutions Honored with \$100,000 Grants

Retirement Organizations in Higher Education (AROHE) that is housed at USC.

Other programs that promote faculty legacies or are legacy programs established within the USC Emeriti Center are:

- Guided Autobiography Course
- USC Lifetime Achievement Awards
- Paul E. Hadley Faculty Award for Service to USC
- Emeriti Center Endowment
- Benefactor Recognition Program
- Inamoto Japanese Cultural Lectures
- Lilia Li Trust Chinese Cultural Programs
- Emeriti Center resource publications written by retiree committees
- Retiree Profiles posted on the USC Emeriti Center's main webpage
(*See Appendix A - Faculty/Staff Legacy Examples*)

History

The USC Emeriti Center was established in 1978 to provide much-needed support and services to faculty and staff before and after retirement from USC. Prior to this time, USC's Benefits Office kept records and provided pre-retirement services. In 1975, the time was ripe for creation of an Emeriti Center, the university having just established the USC Davis School of Gerontology, the first of its kind in the country. It had also recently built the Andrus Gerontology Center building. The first dean of the school, James Birren, welcomed the idea of an Emeriti Center and allocated for it.

Dr. James Peterson, a sociologist and gerontologist, directed the Emeriti Center to provide more comprehensive retirement assistance for faculty age 65, the mandatory age for retirement until 1986. Peterson and other leaders provided retiree resources and support and integrated themselves into the USC administration by helping to create and implement new retirement policies while still serving as understanding advocates and arbitrators for retiree causes.⁵

Three respected retired faculty each in turn led the Emeriti Center; in 1990 the Emeriti Center College was established as part of the Center. Dr. Paul Hadley directed the college and was the founding president of the Association of Retirement Organizations in Higher Education (AROHE), a non-profit organization formed in 2002. Dr. Hadley's vision and management experience helped grow the Emeriti Center in important ways. (*See example documents in Appendices B and C*).

The Emeriti Center's original mission was to serve as the focal point for faculty and staff who were nearing retirement or had retired. It also represented the University's appreciation, concern for, and continuing interest in retirees by providing service and support functions to individuals and to the university. The Center retains this core mission and continues to be part of the Office of the Provost.

In 1978, the Emeriti Center's goals and objectives were:

⁵ Fassbinder, Jolene (1994). "The Emeriti Center and The Emeriti Center College."

- To provide pre-retirement and post-retirement planning and counseling;
- To utilize retired faculty and staff expertise in various services to the university and community;
- To provide service and support to retired faculty and staff;
- To provide or accomplish research, development, and administration in the area of retirement policy and practices;
- To serve as a two-way communication link between the university and retired faculty and staff;
- To provide opportunities for continuing intellectual growth and enhancement of the skills of the retired.

Funding

The first three executive directors of the USC Emeriti Center were respected faculty/administrators who had retired. The Center functioned with funds secured from large foundations, retiree donations, and a small budget from the Provost's Office. In 1990, the Center established the Emeriti Center College with two consecutive \$50,000 grants from the Rose Hills Foundation.

Funding for the Emeriti Center grew incrementally. In the beginning, retired faculty pursued funding through nonprofit foundations and fund raising. The Emeriti Center and the Emeriti Center College were led by retired faculty and staff with one paid part-time administrator. In 2001, for the first time in the Emeriti Center's history, a non-retired female administrator was hired as a part-time (80 percent) executive director. At this time, the Center still needed to conduct major fundraising activities to partially subsidize staff salaries.

The part-time executive director established a larger campus presence by producing a successful 25th anniversary event, a professional video, a development publication, and a strategic planning retreat. By 2006, a full-time executive director was hired, the Emeriti Center was open five days a week, and staff positions were fully funded by the Provost's Office.

The fully-funded Center was the result of a respected leader, Dr. Robert Biller, who organized several faculty and staff retiree leaders to meet with the provost. A special case was presented about the importance of fully funding the center. This would allow Emeriti Center staff to be relieved of time consuming fundraising to support staff salaries. A year passed before the case was revisited with the Provost who was asked to increase the Emeriti Center budget incrementally over three years. He agreed. The center eventually became known as the office of record for all USC retired faculty and staff. Annual fundraising continues and planned gifts and grants help with projects and increasing endowments.

Culture

The Emeriti Center takes the University's *Trojan Family* culture a step further by using *Colleagues for Life* as its motto in all publications. Since the center's inception, the word *Emeriti* has been used as a term to describe honorable service. The center has always been the home for emeritus/a faculty, retired faculty, and retired staff. It supports the work and activities not only of the Emeriti Center

College but also of both the Retired Faculty Association (RFA) and the Staff Retirement Association (SRA).

The Emeriti Center has established itself over the decades as a vital part of the USC culture, helping to ease the transition to retirement by involving retirees in programs, activities, educational seminars, intergenerational exchanges, and more. Emeriti Center programs and services are focused on USC retirees but they also benefit current faculty and staff, USC alumni, and the community-at-large. The satisfaction of USC retirees has risen with every passing decade due to the center's attention to retiree interests and needs and also because of its close relationships with faculty, staff, students, alumni, and offices and schools across multiple USC campuses.

Faculty and staff need to know that they are going to be treated well once they retire. They also need to know there are many meaningful opportunities to stay connected and contribute in retirement. This knowledge adds to a feeling of well-being, making retirees more likely to stay connected with and to support the university. When faculty know the university cares about them and that there are valuable services, programs, opportunities, and resources for them, they tend to respond with planned gifts and donations, mentoring, teaching, volunteering, collaborative research, and speaking well of the university to others. This manner of treating retirees also sends a signal to newly recruited senior faculty and administrators; they are valued by the university and will have special opportunities and privileges when they retire.

Purposes

The USC Emeriti Center, supported by the Office of the Provost, offers educational programs, services, resources, activities, and service opportunities for retirees and pre-retirees that are multidisciplinary, multigenerational, and multicultural.

The USC Emeriti Center

- Provides a retiree Gold Card granting free on-campus parking, library privileges, and discounts. Gold Card privileges affirm how the university honors its retirees for their service and make it easy for retirees to visit campus for activities and volunteer service.
- Is the office of record for retired faculty and staff and maintains retiree records, email accounts, directory listings, and donor records as well as managing events, publications, websites, and transitions-to-retirement sessions in conjunction with Benefits Administration.
- Sponsors the USC Living History Project that has produced video recordings of retired USC faculty and staff since the mid-1980s. Many of these recorded interviews have been posted online on the USC YouTube channel and are listed on the Emeriti Center website.
- Offers two retiree service awards annually, one for retired faculty service to the university (in the name of Paul Hadley, emeritus professor) and one for retired staff service to the university (in the name of J. Tillman Hall, emeritus professor).
- Highlights the legacies of retirees by posting mini-biographies on the Emeriti Center's website.
- Offers opportunities for interdisciplinary projects and publications benefitting retirees, the university, and the community.

- Facilitates Trojan Encore, a program that engages retirees for volunteer and paid part-time positions.
- Offers wellness events and other consumer educational programs that are open to the entire campus community and alumni.
- Hosts the Benefits and Resource Committee that empowers retirees to work with campus partners to advocate for benefits and create programs benefitting retirees as well as the entire campus community.
- Manages regional socials and arranges lifelong learning programs for retirees in their local communities.
- Is directed by the Emeriti Center's Executive Committee, composed of the executive director and retiree leaders. The committee makes important decisions for the center and for Emeriti Center College programs, initiatives, and services that support the university.

Successful Strategies

The Emeriti Center leaders' strategies for success in securing support, whether for funding, space, or approval of an initiative, include actions to:

- Identify and encourage leaders with distinguished reputations and far-reaching relationships to lead the organization, project, or committee.
- Secure the support of highly respected faculty and administrators and use them as champions for the cause; developing relationships with these respected colleagues takes time and effort, but it is most important; building relationships through conversation, meetings, messages, and phone calls is all a part of the process.
- Understand the university's culture and stakeholders; consideration of stakeholders' perspectives in designing programs and services that are most valuable for them.
- Conduct surveys to collect important data for decision-making and project development.
- Be aware of the current atmosphere; understanding current affairs and their multiple implications helps you identify what might be of concern to the administration.
- Allow a period of time to elapse between "asks" for different types of support: staffing, funding, space, equipment, contacts, etc.
- Spend time documenting valuable and important accomplishments.
- Publicize or present accomplishments whenever and wherever possible.

Reasons for Success

As with any organization, experienced leadership is one of the key elements of its success. During the first few decades of the Emeriti Center's existence, retired faculty leaders provided excellent leadership for the center and Emeriti Center College. As respected and widely-known campus leaders, they facilitated cooperation and support, and they encouraged group collaboration to provide the necessary retiree support programs. Emeriti Center committees have included both current and retired faculty and staff from many disciplines and departments. The interdisciplinary and intergenerational groups worked together and shared their wisdom, knowledge and experience for the common good.

Without this collaborative spirit, neither the center nor the college would be as successful as they are today.

The retired faculty and staff associations also contributed to the success of the Emeriti Center and College. They connected USC retired faculty and staff to the university and to the center. Each association board president sits on the Emeriti Center's Executive Committee.

The Emeriti Center collaborates and partners with USC offices and schools to tap the appropriate expertise for various programs. The Provost's Office, Center for Work and Family Life, Human Resources Administration, Benefits Administration, Alumni Association, Career Center, Retirement Plan Administration, School of Gerontology, School of Social Work, and Continuing Education are all partners with the center. Along with many other campus colleagues, they provide resources that enable the Emeriti Center to continue its work.

The Emeriti Center and Emeriti Center College have also been successful because they recognize and demonstrate the importance of USC retirees. They provide opportunities for retirees to contribute in significant ways. Their unique contributions enhance not only the lives of retirees, but they also enhance the lives of many others. Finally, the Center and College have been successful because of their strong desire to promote and uphold the "Trojan Family Spirit."

Retired Faculty Association

Established in 1949 well before the Emeriti Center, the Retired Faculty Association (RFA) represents more than 1,100 members, 784 of whom actively support the RFA through their annual contributions (rfa.usc.edu). It aims to connect retired faculty to USC and to each other. Joining with the USC Emeriti Center, Staff Retirement Association, Emeriti Center College, alumni, and USC's faculty and staff, the RFA actively supports the University's mission. The RFA preserves its legacy by supporting Caldwell Scholarships for undergraduate USC students from local inner-city schools through annual donations and activities for the scholars. In addition, RFA leaders are active on university committees, advocate for faculty, mentor students, contribute to neighborhood initiatives, sponsor lectures, and head up Center and College initiatives.

The USC Living History Project

The USC Living History Project is a cherished university resource that honors faculty and staff and contributes to the historical legacy of the university. Recordings capture individual stories that together offer a tapestry of multiple perspectives describing university history.

The Emeriti Center established the USC Living History Project in the 1980s, honoring H. Dale Hilton (emeriti.usc.edu/programs/living-history-project). This project is responsible for producing more than 60 recorded interviews of important USC faculty and staff documenting their contributions to the university and the university's evolution over time. Most video interviews have been posted on the USC YouTube channel (www.youtube.com/user/USC). The archival-quality recorded interviews have

USC library catalog numbers assigned by the university archivist. Funding comes from the USC Living History Endowment, the USC Emeriti Center, and sometimes from various USC schools.

The USC Emeriti Center is the campus locus of retired faculty and staff who are the living embodiment of the historical evolution of the university. Their minds are the repositories of the past, and their talents helped to create the current university. The interviews are eclectic remembrances of major campus events from the 1940s to the present: the evolving academic environment, administrative restructuring, and research and teaching accomplishments.

Original funding came from private donations. When funding for the Living History Project ran out in 2005, a retired administrator took a leadership role in securing an unused USC endowment established in her son's honor and had it transferred to the USC Emeriti Center. The endowment underwrites approximately two to three interviews per year. A committee of current and retired faculty and staff decide upon the interviewees and facilitate the scheduling, recording at a studio run by cinematic arts students, editing, and sending the finished product to the interviewer, interviewee, USC Communications, and to the university archivist.

The Emeriti Center College

The Emeriti Center College (originally named the Emeriti College) is the academic arm of the Emeriti Center. It was founded in 1990 by Dr. J. Tillman Hall and began under the directorship of Dr. Paul Hadley. The Emeriti Center College was built upon Dr. Hall's belief that "what you don't use, you lose" and aimed to identify and advance the continuing intellectual interests of its retirees. It strived to arrange lectures, teachings, consultations, and research through which mature scholars "may keep their minds vigorous, their knowledge expanding, and their skills sharp."⁶

The College facilitates the service of scholars to society, helping to disseminate accumulated knowledge and wisdom through lectures, short courses, and occasional publications for both colleagues and the general public. Every year the College sponsors between 200 and 400 presentations in the community including lectures, discussions, and multi-generational forums. Many retired faculty and staff teach or take courses to share their knowledge or participate in new learning experiences. Retired faculty can also apply for small research grants to continue their scholarship in retirement.

Emeriti Center College Principal Activities Embraced in 1990:

- Providing panels on critical issues where retirees are willing to participate in discussions on controversial topics of public concern.
- Accepting invitations to speak to social, professional, academic service groups, and senior centers.
- Providing pre-retirement seminars for city agencies and educational institutions.
- Offering part-time teaching assistance in the various fields of specialization at USC and other academic institutions.
- Arranging colloquia with distinguished scholars in order to benefit their retired colleagues.

⁶ Ibid.

- Initiating and supporting neighborhood programs such as the Neighborhood Academic Initiative that enables the parents of urban secondary school students who are enrolled in USC programs to meet with retired faculty and staff.

Today, the college also operates a speakers' bureau, offers campus and regional enrichment classes, manages an intergenerational Forum on Global Change, and sponsors a book club.

The Trojan Encore Program

The term "Trojan Encore" is applied broadly to any USC voluntary or paid part-time work accomplished by a USC retiree either formally or informally. Trojan Encore promotes retired faculty and staff's contributions to the academic community that goes beyond being recalled to teach a class. The official Trojan Encore Program registers retired faculty and staff willing to volunteer and work in part-time/short-term positions. (emeriti.usc.edu/programs/trojan-encore). Creating this program for the paid positions required a university policy change. The program allows a retiree to post a curriculum vita or résumé and provide a schedule for when they are available to work. Academic units seeking volunteers or part-time resource personnel can acquire access to the list of retirees and can interview them for positions.

Guided Autobiography

Not only is Guided Autobiography a legacy in itself, instigated by Dr. James Birren in the 1970s, but it is a way for current and retired faculty and staff to provide a legacy.

The first dean of the School of Gerontology, Dr. James Birren, is considered one of the founders of the field of gerontology. He was instrumental in providing space for the USC Emeriti Center in 1978, and his research in the 1970s on cognitive change and aging led to developing the Guided Autobiography course. He has endowed Autobiographical Studies in the USC Davis School of Gerontology ensuring that his Guided Autobiography method of using thematic life histories would be promoted and taught continuously.

Guided Autobiography classes help ease transitions to and within retirement. Participants write thematic self-histories for themselves and posterity. Current and retired faculty and staff attend the class with university students (the class is an academic for-credit course). After taking the class, participants have gone on to teach the class in more casual, not-for-credit venues such as retiree organizations and churches. These classes provide a multi-generational venue for activating memories and intuitive thinking that causes participants to rethink their lives. These courses provide stepping stones for planning a more purposeful and interesting life, encourage a hard look at life's branching points, and help illuminate a person's life values. (www.guidedautobiography.com).

New Trends and Implications for Higher Education

As institutions of higher education begin to appreciate retiree populations as valuable campus assets,

new retiree centers can become vehicles for retirement transitions and for important services, resources, legacy projects, and connections in retirement. Current research conducted by the Association of Retirement Organizations in Higher Education (AROHE) indicates that the number of retiree organizations on college campuses is increasing. Based upon the 2012 AROHE survey, most retiree organizations on North American campuses are retiree associations (75 percent); the remainder (25 percent) are established campus centers.⁷ The trend over the past four years is an increase in the number of campus retiree centers. (USC was the first North American university to create a retired faculty association [1949] and the second to officially establish a retiree center [1978].)

Recognizing greater life expectancies and the rapid growth of those over age 65, retirement transitions and developing legacies are even more important. The encore career movement, inspired by Marc Freedman and his non-profit organization, Encore.org,⁸ is taking hold in the United States. It emphasizes meaningful and important work for the greater good in the second half of life. This new encore movement may have an effect upon higher education, as the new life stage extending well into a person's eighth decade and beyond can be meaningful and productive for individuals and can inspire important legacies for universities and society.

Conclusion

A major factor for successful retirement transitions is institutionalizing a campus retiree center that can offer ways to stay connected to the university post retirement. A center is a place to go, an office of record, where faculty and staff remain a part of the university. It is where they can go for support, opportunities to contribute, programs, resources, referrals, and important connections.

A center can efficiently connect campus units and serve many schools in an interdisciplinary and collegial atmosphere that honors faculty and staff contributions and offers opportunities to stay connected in multiple ways. A center can also connect and support faculty and staff associations as well as an emeriti college. And, a center can facilitate developing legacies for faculty and for the institution.

The steps to establishing a center, retiree association, or retiree program include:

- Assessing the institution's culture and understanding its stakeholders
- Securing committed, well-known, prominent, and respected volunteers as leaders
- Searching for funding from the institution, foundations, and volunteers
- Institutionalizing programs by having prominent leaders promote the cause, developing good relationships across campus, sponsoring valuable events, and publicizing in digital and printed publications

The importance of creating campus-based retiree centers, emeriti colleges, and retiree associations cannot be emphasized enough. An institution that creates these retiree organizations demonstrates its

⁷ Anderson, Ronald & Brown, Janette C. (2012). "Differences between Centers and Non-Centers among Retiree Organizations in Higher Education in North America, 2012."

⁸ Freedman, Marc. (2007). *Encore: Finding Work That Matters in the Second Half of Life*

commitment to supporting faculty and staff before, during, and after retirement. Subsequently, faculty feel more comfortable transitioning to retirement, and they are more likely to give back to the university beyond retirement. For those institutions wishing to create a retiree organization, AROHE is the nonprofit dedicated to assisting them.

Appendix A

Faculty/Staff Legacy Examples

1. The Emeriti Center is partnering with the Provost's Office to erect half a dozen **faculty history stations** in prominent places on campus, with text and photos honoring the achievements of outstanding retired and deceased faculty in all the scholarly fields of the university. One of the history stations will reside outside the main administration building where the university's officers, trustees, and key friends pass constantly. It honors the legacy of noteworthy faculty, while the other stations are located close to the schools where the faculty taught and conducted research.
2. Since 2002, retired faculty have been able to apply for small research grants to continue their scholarship and extend their legacy (emeriticollege.usc.edu/research-fund). Thanks to support from the Kenneth T. and Eileen L. Norris Foundation, for the past 10 years, grants of up to \$2,000 are available through the Emeriti Center College to assist retired faculty with expenses related to research and publication. Grants also may be used to fund undergraduate research assistants. One grant, or two to three grants, may be awarded up to the total available funding of \$2,000 per year. Previous recipients may reapply after three years. As the funding runs out, endowment interest and donations will continue the support offered by the Emeriti Center College.
3. The Emeriti Center's **Benefactor Recognition Program** provides a means for individuals to honor faculty and other colleagues on specially engraved name plates on two large Benefactor Plaques at the Emeriti Center. The program was created in the 1980s by J. Tillman Hall and Norman R. Fertig with support from the Albert and Elaine Borchard Foundation. Colleagues who wish to honor someone make a tax-deductible gift of \$500 or more and identify their honoree. The engraved plates include the names of both the honoree and the honored. A letter of recognition is sent to both honoree and donor and their names and dates of the recognition are posted on the Emeriti website (emeriti.usc.edu/about/benefactor).
4. Through an Emeriti Center **Inamoto Endowment**, Inamoto Lectures promoting understanding between Japanese and Americans began in the late 1990s. Lectures and other presentations honor the memory of Professor Emeritus Noboru Inamoto who taught at USC from 1953 to 1986. Born in Canada and schooled in Japan and the U.S., Professor Inamoto devoted his life to fostering better understanding between the people of his two adopted countries, the United States and Japan. After his marriage, his wife Barbara joined him in this work, and it is her \$30,000 endowment gift to the Emeriti Center that supports Inamoto programs highlighting US-Japan relations in his honor.
 - a. Proceeds from Professor Inamoto's published book, "My Three Homelands," published in 1994, also support the Inamoto Fund in the USC Emeriti Center.
5. A special contribution to the USC Emeriti Center endowment through a planned gift from Professor **Lilia Huiying Li** has provided funds to support **Chinese cultural programs** through the Emeriti Center. The USC Emeriti Center received an \$110,000 charitable remainder annuity trust gift from the estate of Professor Li, wife of Professor Emeritus George O. Totten III. The trust was set up on behalf of the Emeriti Center and was funded in 2009 after both Lilia and George passed away.

- a. Lilia Huiying Li's trust provides for ongoing learning events for USC retirees, faculty, staff, students, alumni, and the greater community. When the trust was signed in 1992, Paul Hadley, then Emeriti Center Director, indicated the significance of this gift that recognizes the long-term role of the Emeriti Center and Emeriti Center College in the intellectual and international life of the university and furthers USC's role in developing peaceful communication among the major entities of the Pacific Rim.
 - b. Li was a lecturer, writer, journalist, and special correspondent. Her principal concern was the search for peace between Taiwan and the People's Republic of China.
6. Many faculty members have endowed chairs, professorships, libraries, and centers. In addition, they have established scholarships before or after retiring from the university and continue to contribute to many causes for which they feel a strong commitment (about.usc.edu/faculty-distinctions/named-chairs-and-professorships).
7. The USC Emeriti Center webpage highlights "**Retiree Profiles**" and illustrates their work at the university and their lives in retirement. The USC Emeriti Center's main webpage features "Life After Retirement" at the bottom of the page.
 - a. USC retirees are busy with many interesting and purposeful activities after working full time. In many cases, this life stage is filled with meaningful and important work. The USC Emeriti Center website is a place to inform others about a colleague's many years of service to the university and "Life After Retirement" (emeriti.usc.edu).
 - b. Retired faculty and staff postings rotate at the bottom of the webpage. They each include a photo and information about the retiree's work before and after retirement. The short vignettes serve to inform and inspire.
8. USC Emeriti Center Resource Publications - Leaving a Legacy to Benefit to the University and Greater Community
 - a. After the Death of a Loved One (emeriti.usc.edu/files/2011/06/EmeritiAfterDeath.pdf)
 - b. My Confidential Documents (Writeable PDF) (emeriti.usc.edu/files/2011/06/Emeriti.web_.pdf)
 - c. USC Emeriti Center 2007 Situation and Circumstances Survey Report (emeriti.usc.edu/files/2011/06/Situation-and-Circumstances-Report-20072.pdf)
 - d. USC Emeriti Center Brochure (emeriti.usc.edu/files/2011/06/Emeriti.web_.pdf)

Appendix B

January 6, 2000

Dr. Martin L. Levine
Vice Provost, Faculty Affairs
LAW 306B MC 0071

Dear Dr. Levine:

The persons listed have constituted a Long Range Planning Task Force to consider the future of the Emeriti Center programs, including the Emeriti Center College. Our deliberations have acquired a special importance because of the imminent retirement of our present administrative personnel, with the exception of the Director of the College, Dr. William Faith. We have tried to follow Provost Armstrong's instructions that the primary mission of the Emeriti Center should be to render human services to faculty and staff retirees in order that they may remain active members of the University family.

In order to fulfill this mandate, we have divided the assignment into two broad segments: 1) the Emeriti Center, which maintains records, serves as advocate, and administers services and benefits, including the Transitions Retirement Education Series, to which University employees, as well as retired staff and faculty, are invited; and 2) the Emeriti Center College, which provides intellectual service to our retirees and to the community.

In considering these objectives, we have posed a number of questions which the Task Force is deliberating and on which your guidance will be both appreciated and necessary.

1. Given the present level of staffing, with only part-time personnel and a group of volunteers, how can we perform these services effectively?
2. How shall we reconstruct our staffing?
3. How can the Emeriti Center, including the Emeriti Center College, communicate its mission and services more effectively to a) the University administration and campus community, b) faculty and staff who are within range of retirement, c) existing retirees, and d) USC alumni and the wider community?
4. Are there additional services, intellectual and administrative, that we should provide?

Since you are the designated representative for the Provost in matters related to the Emeriti Center, we feel that you are key to communicating with Provost Armstrong. Your advice is essential and critical as the Emeriti Center determines its future. Accordingly, we request that you receive either this entire group, or a designated subcommittee, to discuss these matters.

Yours very sincerely,

Paul E. Hadley
Director, Emeriti Center

PEH:mbs

William Faith
Frances Feldman
Norman Fertig
Eli Glogow
Walter Graf
Paul Hadley
Tillman Hall
Howard Hansen
Dale Hilton

Anthony Lazzaro
Taylor Meloan
Janis Romero
Harriet Servis
Madaleen Smith
William Thomson
Nancy Warner
Teri Ziegler

Appendix C

Paul E. Hadley, Ph.D.

Director, Emeriti Center
University of Southern California
March 26, 2001

Making the Structured Emeriti Center Effective

The mandate to the Emeriti Center of the University of Southern California as expressed by the provost, Lloyd Armstrong Jr., is “to provide personal and professional services to retired faculty and staff so that they will remain lifelong members of the university family.” It is our firm belief that this mandate is applicable to any institution of higher education. Staff and faculty who have contributed their professional lives to a college or university have immense value. Their loyalty, if cultivated and maintained, brings countless intangible benefits. Retirees can contribute on a paid or a volunteer basis to the ongoing activities of their school. Their expressions of support and endorsement are useful to the recruitment of incoming students, including, of course, their own grandchildren. If their loyalty is indeed maintained, they are legitimate and remarkable sources of financial support. They can be available as sage counselors on various levels. Given their freedom from full-time campus responsibilities, they can contribute to the community service programs of their institution – services which are recognized today more than ever as a necessary part of an institution’s mission. Retirees have a special affinity to the students they served over the years. Their presence at alumni gatherings and their participation in alumni activities constitute a strong sense of endorsement.

In order to maintain this kind of loyalty and expression of service, the institution must do its share. Whatever its retiree organization may be, it can and should provide retirement counseling over the years prior to retirement, guiding faculty and staff in making financial and personal plans. The institution should maintain accurate records of a retiree’s achievements both prior to and after his or her retirement. By law and by institutional organization, retirees receive various benefits – retirement and health stipends, assistance with lifelong health care, and continuing education. The university must administer these benefits. In order to understand the needs of retirees, a program of research should be established, tracing the lifestyles of retirees and evaluating their adjustment to outside life. Since the contributions of retirees depend on their continuing intellectual activity, programs to stimulate reading, scholarly research, travel, and productive activities should be provided. Most universities have support organizations composed of staff and faculty retirees. These organizations are entitled to a minimum of space, access, and clerical support. A university family participates in social, cultural, athletic, and intellectual events. It is to the interest to the institution to invite its retirees to such events. Most retirees engage in full-time or part-time second or third careers. Their institution can support them through providing and encouraging such activity. Since their achievement in retirement redounds to the reputation of the institution itself, retirees’ achievements are properly recognized by the institution’s news service and other means of public relations. In order to tie all these things together, some regular form of communication is needed, through retiree newsletters and complimentary subscriptions to university publications.

The Emeriti Center at the University of Southern California is nearing its 25th anniversary. The Retired Faculty Association has over 50 years of social interaction, providing a home for retired professors. The Staff Retirement Association is more recent. The Center itself was established primarily as a research unit, studying the needs and adjustment of retired faculty and staff as a basis for the provision of benefits and privileges. The Emeriti Center College, the intellectual wing of the Center, is now in its 11th year. The Center has grown to accommodate the increase in its activities. (See the attached chart.) All the positions listed are part-time. The senior administrators are retirees, earning somewhat less than they received during their active careers. The support staff are also part-time. They are younger and eligible for regular university salaries. The Emeriti Center Council meets monthly to receive reports on the activities of the Center. Membership on the Council includes representatives from some twenty campus groups which have some connection with retirement policies and practices.

An annual program of pre- and post-retirement counseling is offered, called Transitions. This year Transitions took the form of a fair with tables displaying materials from university and external organizations offering health, pension, insurance and other benefits. Simultaneously, oral presentations provide group counseling.

A standing committee on Retired Faculty and Staff Benefits meets monthly to study the health and welfare needs of retirees, to negotiate new benefits and privileges with University agencies and to make recommendations to the administration.

The financing of the Emeriti Center is still developing. The university provides a basic budget, which compensates the Director, the Associate Director, the records maintenance, materials and supplies for travel and the office space occupied. An annual telephone campaign reaches most of the retired faculty and staff, requesting their financial support. Programmatic activities of the Center are maintained through external funding: from foundations and individuals.

The Center is now beginning a major development program. A case statement has been prepared. (Copies are available in the exhibit area.) Efforts will be made to expand the funding for the activities of the Center. Permanent facilities in a building to be shared with the Alumni Association and the Faculty Center are being designed.

The Emeriti Center College, as indicated above, is the intellectual arm of the Center. It began as a provider of lectures to senior centers in the area, stimulating retired faculty to continue their intellectual activity in the preparation of presentations in their subject fields. The demand has grown, spreading to other kinds of neighborhood and community organizations: the parents of neighborhood school students, service clubs, churches and alumni organizations. In the year 2000, approximately 250 lectures were presented to some 10,500 listeners. It is sometimes necessary to recruit active faculty and staff to meet the needs. The Emeriti Center attempts to contribute to each of the university's strategic initiatives, neighborhood service being one. As the University of Southern California moves into position as a research university, it is important not to lose rapport with its undergraduate students and their needs. The Emeriti Center College furnishes instructors for freshman seminars, guides undergraduate students in research projects and recruits mentors for student leaders. The College has obtained funding from foundations to assist retired scholars with their research and publication. Each year the College conducts a consultation among retired faculty and staff in order to advise the University on issues of current significance. Recent consultations have included reports on

the tenure system, on distance learning, on gender and equity, on support for scientific research. This year's topic is intellectual property.

A retiree book club is now in its ninth year. Meeting monthly, the members read and discuss current and classical works of literature. Funded lectures include the recognition of research by a retiree scholar, research by an active scholar, and a lecture on United States-Japanese relations honoring a deceased faculty member.

Volunteers are necessary to carry on these programs. A chief of volunteers keeps regular office hours, and individuals are recruited to perform necessary ad-hoc tasks. As indicated above, the Center participates in the University's program of neighborhood service, most notably to date in the field of parent education.

In order to maintain communication with its 1800 retired faculty and staff, the Center publishes a quarterly newsletter, an annual report, a basic brochure describing its programs and services, its benefits and services, and a "Steps to Retirement booklet," providing guidance to future retirees. A unique publication is a series of living history videotapes recording interviews with outstanding retired faculty and staff leaders. Twenty-eight of these videotapes have now been recorded, honoring a deceased associate director of the Center. They are made available for loan through the Gerontology library of the University and are also deposited in the University Archives.

Any organization, in order to live, must continually expand. Some of the programs now in development include a professional service corps which would provide opportunities for retired staff and faculty to continue their contributions to business, community, and educational organizations on either a volunteer or a paid basis. A study has been completed as to how the Emeriti Center College can communicate with its listeners electronically. An experimental program will webcast presentations to senior centers with live discussion groups to follow. It is sometimes felt by staff retirees that the Center provides a disproportionate amount of service to its retired faculty. A survey of retired staff in the year 2000 has provided a list of activities and interests that can be served. Trips to local points of cultural interest are the first of these interests to be recognized.

The concept of "learning in retirement" as described by the Elder Hostel movement gives recognition to the lifelong intellectual activities of retirees. The University has established an office of lifelong learning, replacing its continuing education program which was discontinued some 20 years ago. (The Emeriti Center and College will be cooperating with this organization.)

As mentioned above, university retirees, both faculty and staff, have their own social organizations. The Emeriti Center provides limited staff support for these groups, occasional speakers for their meetings and participation in a number of their projects.

Finally, the University of Southern California, along with a number of other universities, has participated in seven International Conferences on Retirement in Higher Education. A meeting of its steering committee this evening will plan the eighth conference and discuss how the conferences may expand in participation and service. New institutions are cordially welcomed. Participation in this evening's meeting is strongly encouraged.

References

About USC (about.usc.edu)

Alboher, Marci. (2013). *The Encore Career Handbook: How to Make a Living and a Difference in the Second Half of Life*.

Anderson, Ronald & Brown, Janette C. (2012). "Differences between Centers and Non-Centers among Retiree Organizations in Higher Education in North America, 2012." Unpublished paper.

Caldwell, R., Shiley, N., Murphy, J., Green, S., Discorfano, J., & Carson, D. (2010). University of Arizona Retirees Association - Results of Communication Study. UARA Communications Committee.

Fassbinder, Jolene (1994). "The Emeriti Center and The Emeriti Center College." Unpublished paper for GERO #499 Directed Research Study, May 3, 1994.

Fogg, P. (2003). "Gray Expectations: Emeritus Centers Bring Retired Professors Back to Campus", *Chronicle of Higher Education*, (Feb. 7), A 8-9.

Freedman, Marc. (2007). *Encore: Finding Work That Matters in the Second Half of Life*

Glaser, S. D. et al. (2005). "Continuing the Connection: Emeriti/Retiree Centers on Campus," *Educational Gerontology*, 31, 363-83.

Kaskie, B., Leicht, K., & Hitlin, S. (2012). Promoting Workplace Longevity and Desirable Retirement Pathways Within Academic Institutions. TIAA-CREF Institute, Trends and Issues (Feb Issue.).

Perlmutter, David D. (2012). "In Search of a Professor's Legacy", *Chronicle of Higher Education*, (Mar.18).