

ACS Faculty Renewal Grant

Report for May, 2008-May, 2009

Names of Persons Submitting Report:

1. Clint E. Bruess, Professor of Education
2. William E. Nicholas, Professor of History
3. Samuel J. Pezzillo, Professor of Classics
4. Eileen E. Moore, Professor of Education

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Institution: Birmingham-Southern College

Name of Project: Navigating the retirement Zone: Making A Healthy Transition from Teaching Into Retirement

Dates of Project: May, 2008-May, 2009 (now with permission it will be extended to May, 2010)

Amount Awarded: \$5000

1. The original goals and objectives were as follows:
 - Getting questions answered concerning “best practices” for retirement.
 - Having first-hand information from recently retired ACS faculty about decisions they made concerning retirement that worked out well and decisions that didn’t work out so well.
 - Having information about fiscal planning related to TIAA.
 - Having information about fiscal planning related to issues other than TIAA.
 - Planning for a physically healthy retirement.
 - Managing good mental health during the retirement zone and beyond.
 - Beginning activities that will lead to positive social health during retirement.
 - Understanding the rights of ACS faculty at the institution from which they retire.

- Making retirement decisions for future ACS faculty easier and more meaningful by making this project sustainable.
2. Our goals and objectives did not change during the project, but the degree of anticipated emphasis on some of them did change.
 3. To get a feeling for how the goals were met, here is a brief summary of what was covered at each of our sessions:
 - a. May 7, 2009—“Words of Advice.” Several BSC retired faculty discussed retirement with BSC faculty preparing for retirement in the next 1-5 years. The discussion centered on 4 major areas of concern: the College’s role, financial viability, maintaining health and health insurance coverage, and remaining socially engaged. These discussions also helped shape what we planned and did during the next academic year.
 - b. October 1, 2009—“The Big Picture Look at TIAA-CREF. A representative from TIAA-CREF talked with the group. Topics included determining your income needs, threats to your retirement cash flow, withdrawals and income options, and action steps to take today.
 - c. October 29, 2009—“Social Security.” A representative from the Social Security Administration talked with the group about understanding Social Security benefits, making retirement planning easier, online retirement planning, and Social Security online services.
 - d. November 12, 2009—“Blue Cross/Blue Shield and Medicare.” A representative from Blue Cross/Blue Shield talked with group about health care options before and after retirement.
 - e. March 4, 2009—“Legal Planning Issues.” A local attorney who specializes in estate planning and related legal issues talked with the group. Emphasis was on estate planning in general, wills, and advanced directives.

- f. April 1, 2009. "Promoting Social, Mental and Physical Health." A local minister with extensive experience working with the older population talked with the group about his experiences and observations. Contrasts were made between those people who had moved effectively into retirement and remained productive citizens and those who had not been as successful. Emphasis was on how the successful people promoted their social, mental and physical health.
 - g. May 6, 2009. "The Relationship of BSC to Retired Faculty." A panel of BSC administrators (provost, director of HR, and VP for Instructional Technology) discussed numerous issues with the group. Topics of interest to the group were shared with the administrators in advance and included IT rights and support for retired faculty, ideas about communications with retired faculty, professional and social opportunities for retired faculty, and rights of emeriti faculty in general.
4. Our evaluation/assessment process consisted of discussions among ourselves before and after the sessions. For example, we frequently talked about what we originally set out to do, what had happened so far, how we felt about our progress, and what we wanted to focus on in our coming seminars. Given the relatively small size of our group, we did not feel that a formal evaluation system was needed.
 5. If we were to do this project again, we would probably do many of the same things and have the same seminars. They in general helped us learn what we set out to learn. In retrospect, it might have been helpful to have an "expert" or two meet with the group to focus more specifically on mental health and physical health promotion as we age.
 6. Our seminars were open to all faculty 55 and older. About 18 chose to participate in some or all of the sessions. Due to the nature of our topics, there was no reason to reach out to a broader group of faculty on campus.

7. The main way this project could impact the institution as a whole will be to promote the development and implementation of written policies related to retired faculty. These will probably focus on emeriti faculty rights related to instructional technology, communications, use of campus space, and professional and social opportunities.
8. There were no students involved in this project.
9. At this point we have not shared our results with colleagues at other ACS institutions. While we would be willing to do this, there does not seem to be an appropriate mechanism for doing so. In addition, what we did is specific to older faculty and the potential audience is limited in this respect.
10. There were no publications that resulted from this project and, at this point, none are planned. This could change in the future.
11. We will be working with appropriate BSC administrators to clarify policies related to retired faculty. For example, Instructional Technology has already developed a written Emeriti Support Policy (copy enclosed). In addition, we will be working with the BSC Office of Alumni Affairs during the next year to establish potential ways to increase communication with retired faculty while also “showcasing” newer faculty and older faculty at the same time. A more specific proposal for this activity is enclosed.
12. The amount ACS awarded us for this project was \$5000.

13. Here is a summary of our work that could be included on the ACS Faculty Renewal website:

A group of Birmingham-Southern College faculty nearing retirement age conducted a series of seminars related to topics of interest. The topics included Words of Advice from Previously Retired Faculty, The Big Picture Look at TIAA-CREF; Social Security; Blue Cross/Blue Shield and Medicare; Legal Planning Issues; Promoting Social, Mental and Physical Health; and The Relationship of Birmingham-Southern College to Retired Faculty. As a result of the activities, faculty will work with BSC administrators to develop a more defined role for the College in its relationships with retired faculty.

Emeriti Support Policy

This document will serve to identify the general principles of technology support available to emeriti faculty who are assigned work space at Birmingham-Southern College for the purpose of continuing their professional activity. Emeriti faculty may request workspace in the Library. Allocation of space will be determined by the Director of the Library and the Provost. The purpose of this document is to clarify issues involving the provision of computing/printing availability, network (including the Internet) and software application access, telephone service, and technology support.

Computing Hardware and Printing

At the time a faculty member retires from active teaching – and if that faculty member has been recognized with emeritus status, the faculty member will be permitted to relocate the existing laptop/desktop workstation from their office to the emeriti office location. This computer will then be removed from the standard replacement cycle for active faculty members. Future repair or replacement of that unit will be at the discretion of the College. Individuals who have acquired multiple computing units through grants or endowed funds are expected to select one computer for relocation. All additional computing equipment will be returned to the general College inventory for reassignment as appropriate. If any special technology equipment is required for professional work, arrangements can be made with IT to address those needs. Printing services will be provided on the same shared network basis as for regular faculty/staff printing. The College does not provide nor does it support individual desktop printers. A telephone with local calling service only may be possible, subject to line availability.

Network and Software Applications

Each emeriti faculty will retain their Birmingham-Southern College network account and e-mail address that is linked to that account. Full network access is provided to all software applications for which the College maintains a campus license agreement on campus-owned equipment.

Technology Support

Emeriti faculty will request and receive support from IT for professional activities in the same manner as other college constituents. The Help Desk is available via web access, e-mail and X4849 and will accept requests during normal business hours. Priority will be given to active faculty, staff and student needs with emeriti faculty receiving assistance as time permits. Any exceptions to the elements of this policy must be authorized by the Vice President for IT.

ACS Mellon Foundation Faculty renewal Grant (Extension)

Names of Persons Submitting Extension Grant:

1. Samuel J. Pezzillo, Professor of Classics
2. Clint E. Bruess, Professor of Education
3. William E. Nicholas, Professor of History
4. Eileen E. Moore, Professor of Education

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Institution: Birmingham-Southern College

Name of Project: Making the Connection , “Staying Alive” (apologies to the Bee Gees)

Dates of Project: May, 2009-May, 2010 (now with permission it will be extended to May, 2010)

Building on our grant of last year, “Navigating the retirement Zone: Making A Healthy Transition from “Teaching Into Retirement, we propose to hold a series of seminars (6) in conjunction with the Alumni Affairs Office of the College whose purpose is to bridge the transition between the active teaching career and retirement.

One of the key elements we discovered in our series in 2008-2009 was that there exists a great deal of anxiety in faculty as they approach retirement after long and active careers. Even if they have tentative plans to use retirement for more reclusive activities, they are very reluctant to leave their teaching and scholarship behind. Those with plans to maintain an active scholarly life, even in retirement from teaching, express some anxiety about how to maintain an active foothold in those aspects of the institution that helped sustain their work while teaching, like library use and instructional technology support and, most importantly, that regular contact with active scholars. It was only with a bit of tongue in cheek that our report for last year includes the comment that “it might have been helpful to have an

“expert” or two meet with the group to focus more specifically on mental health issues....” (item 5 in report).

As we discussed these anxieties with attendees, one idea that seemed to resonate with the group was a series of seminars that would bring together current faculty, retired faculty, and regional alumni in occasional gatherings (6 for the year) in which new faculty might give brief lectures showcasing their areas of scholarship and teaching (as a sort of mini conference for retired faculty and alumni). Such presentation might reassure the retired faculty that their disciplines are in good hands; and for recent alumni, there might be a similar recharge of the intellectual excitement they felt while students. A few of the occasions could be used for recently retired faculty to share their own going research with similar benefits and, especially, to maintain a personal link to active scholars and teachers on the campus. Each of these mini seminar/conferences would be accompanied by a social gathering at which all could mingle informally to promote those personal ties.

The residual funds from last year’s grant, \$2858.08, would be used to pay a small honorarium to the speaker, \$150.00, to pay incidental costs in promoting the seminars, and to provide food and snacks for the social aspects of the meetings.

The model for this idea was a series of mini-lectures run by the Alumni Office in 2008-2009 in which current faculty (among them two of the applicants here) gave brief lectures to alumni. The events, dubbed “Re’wined” were held at a local high-end restaurant and targeted mostly well-healed alumni. The fees for participation were appropriately high. This idea, while building on those events, targets a different audience, expands that audience to include current faculty, and proposes to impose no charges on participants.

We hope that the outcome of this “pilot” will be a continuing “Staying Alive” program funded by the alumni office that would serve all the purposes we have outlined above as well as their own regular efforts to keep graduates attached to the college family.

Date: June 9, 2009

To: Marcia White

From: Clint E. Bruess

Re: ACS Faculty Renewal Grant

Marcia, here is the additional information you requested about our ACS Faculty Renewal Grant. During the course of the year we had participants from the departments of theater, music, English, political science, education, business, history, classics, biology, computer science, and the library. Listed below are the dates of the sessions, the topics, the consultants, and the number of attendees.

1. On May 7, 2008, the topic was "Words of Advice." Two BSC retirees (Lola Kaiser and O.C. Weaver) gave their thoughts and responded to questions from the group. Sixteen faculty attended. As a result of the discussion various topics were raised that served as the foundation for planning for the next year's sessions. The major issues/suggestions were:
 - a. There is a need for more information about retirement planning from the Human Resources group on campus.
 - b. More ways need to be developed to help faculty stay connected to the College once retired.
 - c. There is a need to clarify the "emeritus" status and its rights.
 - d. Written policies are needed related to benefits for faculty retirees such as e-mail accounts, websites and providing "server" based research.
 - e. Is there a possibility of having a "phase out" retirement policy for faculty?
 - f. Details about TIAA-CREF are needed along with financial planning in general.
 - g. More needs to be known about maintaining health & health insurance coverage.
 - h. What suggestions are there for remaining socially engaged?
2. On Oct. 1, 2009 the topic was "The Big Picture Look at TIAA-CREF. The consultant was Allyson A. Ray, CFP, Consultant for Individual Client Services at TIAA-CREF. She provided an excellent overview and many details about TIAA-CREF. She used a very good PowerPoint presentation and gave all participants a booklet entitled "TIAA-CREF Retirement Strategies. Twelve faculty attended the session.
3. On Oct. 29, 2009, the topic was Social Security. Jody Harris from the Social Security Administration was the consultant. He gave the history of the development of Social Security, talked about benefits of Social Security, discussed how to begin to receive Social Security benefits, and gave participants a number of handouts related to Social Security benefits and general information. Eleven faculty attended the session.
4. On Nov. 12, 2009, the topic was Blue Cross/Blue Shield and Medicare. Paul Simmons, Marketing Representative from BlueCross BlueShield of Alabama gave us lots of information about the background of BCBS and how it operates today. Many handouts were provided about the various plans and procedures. Paul also explained how Medicare works and how there is blending of benefits between BCBS and Medicare. Twelve faculty attended the session.
5. On Mar. 4, 2009, the topic was Legal Planning Issues. The consultant was Susan Doughton from a local law firm. She talked with the group about her specialty—legal planning issues and advance directives for health care (living will and health care proxy). She provided a sample advance directive and went over the main issues within it with the group. There was a healthy discussion about legal planning issues in general. Eleven faculty attended the session.

6. On April 1, 2009, the topic was Mental/Social Considerations. The consultant was Mike Harper, a minister with extensive experience in churches and with the central operations of the Methodist church. He has been especially active working with older people related to their needs. The presentation and discussion focused on the need to be mentally and socially active along with ways to do that. Ten faculty attended the session.
7. On May 6, 2009, we held our final seminar for the year on the topic of "The Relationship of Retired Faculty to BSC." A panel of three administrators, Susan Kinney from Human Resources, Wayne Shew from Academic Affairs, and Anthony Hambey from Instructional Technology talked with the group and responded to questions. Prior to the session the three individuals were given a list of questions/issues that the group wanted to have addressed. Many of the questions that had been raised during previous sessions were addressed and discussed. As a result, IT developed an Emeriti Support Policy (attached). Other policy documents and procedures will be considered jointly by BSC administrators and faculty from our group during the coming months. Fifteen faculty attended the session.