

**University Of Southern California
Emeriti Center • Emeriti Center College
Annual Report – July 2005 Through June 2006**

Prepared for:

The President • The Senior Vice-Presidents • The Deans • Emeriti Center Council • Emeriti College Advisory Committee • Retired Faculty and Staff

MAJOR EFFORTS

- **USC Retiree Community Strategic Plan.** Beginning early in the fall, 13 representatives of the RFA, SRA, Emeriti Center, and Emeriti College began to work together on behalf of the USC Retiree Community. From great consensus in discussions, a document emerged expressive of the opportunities for strengthening the relationship between USC and its retirees. Initial drafts were prepared by Bob Scales, Bob Biller, and Betty Redmon, with Frances Feldman rewriting the plan into a more cohesive form. On February 28, 2005, the plan was delivered to the President and Senior Vice Presidents. Subsequent meetings to discuss the plan found each of the Senior Vice Presidents strongly in support of ideas expressed, as well as identifying others. With this groundwork laid at the university level, an implementation strategy needed to be developed based on the interests, concerns, and involvement of USC retirees. To better understand these criteria, plans were laid for a USC Retiree Community retreat in the fall.
- **Retiree Survey 2005.** To better understand the community we serve, Bob Scales created, implemented, and compiled a survey that was sent to all USC faculty and staff retirees. Four hundred twenty-five responses were received and entered into a database for ongoing analysis in evaluation of existing programs and new initiatives. Summary reports were widely distributed to USC administrators, faculty, staff, and retirees.
- **Emeriti College Database.** Bob Scales undertook the formidable task of automating the office functions for administration of the Community Lecture Program. He designed an elaborate database, interfacing stored data with scheduling forms, notices, letters, and reports, thus streamlining the system and creating administrative time for growth.
- **Reorganization.** In preparation for greater collaboration with and between the SRA and RFA and greater involvement by more retirees in implementation of the strategic plan, the Emeriti Center reorganized its staff and redefined its culture. For seven years following his retirement from the professorate, Bill Faith faithfully served as Director of the Emeriti College, leading its growth into national recognition. Upon Dr. Faith's "3rd or 4th retirement" in the spring, Bob Scales accepted the position, having served since 2003 as Associate Director and Faculty Liaison of the Emeriti Center. Mitzi Tsujimoto, an invaluable volunteer, continued in her 10th year as Associate Director and Staff Liaison. Bob Biller graciously consented to become Associate Director for Advancement.

As collaboration with the SRA and RFA increased and several joint activities were planned, the Emeriti Center Executive Committee was redefined to consist of the Emeriti Center Director (Betty Redmon), Emeriti College Director (Bill Faith/Bob Scales), Associate Directors (without subtitles—Mitzi Tsujimoto and Bob Biller), and Presidents of the RFA and SRA (Phil Manning/Bob Coffey and Harriet Servis/Carole Gustin). All positions are voluntary except for the two directorships.

Office staff also underwent change. Upon vacancy of the position of Associate Director for Administration held by Della Marshall, duties were reassigned to the remaining staff. Jennifer Ontai was hired into a paid staff position as she completes her work on her doctorate and was subsequently upgraded. Judy Diaz was promoted to Associate Director of the Emeriti College upon the resignation of Jill Trimble. Gloria Reyes was hired into a new position, in anticipation of capitalizing on her Master's Degree in Gerontology. Joan Mason completed her last full year as volunteer bookkeeper, as she plans to move to Phoenix in Spring 2006. Christine Shade, *former editor of the USC Chronicle*, joins the staff parttime.

Many other volunteers, including members of the Executive Committee, and returning work-study students round out the office staff.

A Provost's Search Committee, comprised almost entirely of USC retirees, was established to find a new Emeriti Center Director upon the announcement by Betty Redmon of her anticipated retirement. The Committee whole-heartedly supported the hiring (fulltime) of Dr. Janette Brown from the USC Career Center, who will begin on July 22, 2005.

A new era of collaboration and cooperation has begun, and the Emeriti Center and Emeriti College are positioned to provide the USC base, core services, and support for strengthened connections between USC and its retirees.

- **AROHE Conference.** The Association of Retirement Organizations in Higher Education (AROHE), founded under the inspiration and leadership of Paul Hadley and Harriet Servis, held its second bi-national (United States and Canada) conference October 8-10, 2004, in Nashville, Tennessee. Betty Redmon, Bob Scales, and Bob Coffey attended. Featured speakers were John R. Siegenthaler, founding editorial director of *USA Today*; John P. Keating, Chancellor of the University of Wisconsin at Parkside; Eugene Rice, Director of the Forum on Faculty Roles and Rewards, American Association of Higher Education. A panel featured the co-editors of *To Retire or Not: Retirement Policy and Practice in Higher Education*: P. Brett Hammond, TIAA-CREF; Robert L. Clark, North Carolina State University; and Ellen Switkes, University of California. USC retiree organizations were featured in the first session on academic retirement organization models and in the showing of the DVD on the USC Emeriti Center *Connecting for Life*. AROHE Board members from USC are Dr. Hadley, Immediate Past President and permanent honorary director; Harriet Servis, Secretary, and Ms. Redmon, Executive Director. As the secretariat for AROHE, the USC Emeriti Center maintains the AROHE membership database, a ListServe email messaging system and produces a newsletter. Ms. Redmon wrote a grant application for use in AROHE funding-raising. She and Ms. Servis organized and attended Board of Director meetings through conference calls and at the University of California at Berkeley.
- **Increased funding.** In support of the USC Retiree Community Strategic Plan, Provost Nikias increased the USC Emeriti Center operating budget for the coming fiscal year (2005-2006) by \$100,000. The services for one day a week of Christine Shade have been loaned to the Emeriti Center by Senior Vice President Martha Harris. Several meetings were held with potential donors, resulting in gifts of over \$2,000,000 to USC. Efforts to secure endowments for the Emeriti Center, Emeriti College, directorships, or programs continue under the leadership of Bob Biller.

RETIREES SERVED

As of June 2005, the Emeriti Center supported a total of 1568 retired faculty and staff, in addition to 111 spouses of deceased retirees. 280 clinical medical faculty retirees comprise the remainder of the active list.

BENEFITS AND PRIVILEGES

Retired Faculty/Staff Benefits Committee is engaged in a continuing effort to achieve an increase in Health Care benefits for USC retirees. Bob Biller and Betty Redmon collected comparative data on health care coverage provided by the other California AAU Research Universities and prepared the first draft of a proposal to the university. Guest speakers helped the committee investigate dental coverage and an HMO, but no action was deemed to the benefit of the general retiree population. Much attention was given to the evolving federal plans for Medicare Part D (Drug Coverage) and its implication to USC Senior Care. Active committee members Josie Herrera from USC Senior Care and Lisa Macchia from USC Health Plans provided valuable updates and insight. Coordinated by committee member Lara Mirzians, the USC Credit Union hosted seminars for USC retirees on tax law and on estate planning. The committee continued monitoring university benefits, as well as investigating several issues raised by individual retirees. As committee chair, Gilbert Siegel represented USC retirees on the University Benefits Committee.

COMMUNICATION

New Retirees were issued a "Retiree Gold Card" and receive a packet containing directory listing form, e-mail request form, retirement association brochure, Emeriti Center brochure, Emeriti College questionnaire, Retiree Privileges booklet, *Chronicle* mailing request form and volunteer information form. At an annual luncheon, co-sponsored with the RFA in November and the SRA in March, the Emeriti Center presented each new retiree in attendance with a copy of *USC Trojan Gallery*. Bob Scales assisted RFA officers in creating a special luncheon with the new faculty retirees to find out about them and to let them know more about the RFA and the Emeriti Center.

The Emeriti Center Newsletter was published in Fall 2004, Spring 2005 and a special summer 2005 edition. It included articles by Emeriti Center Staff, Retirement Association Presidents, Emeriti College Lecture schedules and other important news. It reached approximately 2400 USC retirees, campus administrators and leaders, as well as other campus retirement centers nationwide.

The Emeriti Center Website, www.usc.edu/org/Emeriti_Center, is monitored by Michael Halloran, Associate Director for Communications Technology.

ListServe, EC_Forum-L@usc.edu. Michael Halloran maintained a communication link among retirees who join the EC Forum, hosting announcements, information, concerns and requests. Members are able to send and receive messages.

The University Directory was published in January 2005. Retiree contact information was included. Nearly 800 directories were distributed to retirees who took advantage of this benefit.

E-mail accounts were established and administered by the Center as a complimentary service to retirees, allowing them access to the USC server for web browsing, a website space and connection to the USC Trojan Family.

Retiree Records and biographical data are maintained for retired staff and faculty. USC is continuing to investigate improved systems for obtaining retiree data. Labeling services were provided to other University departments enabling retiree invitations for Commencement, Convocation and other important University events.

HUMANITARIAN SERVICES

Ombudsman Services were offered by the Emeriti Center, referring USC retirees to appropriate campus services and departments.

Retiree Birthdays. Staff Retirement Association volunteer Virginia Ainsworth sent greeting cards to staff retirees.

Illness and Death. Many personal notes and condolences were sent when death or illness information was received, and memorial services were attended when possible. Information for obituaries and memorials was provided to university units and publications.

Frail or Needy Retirees remain a major concern and were the subject of several discussions among retirees and with university administrators.

PRE- AND POST-RETIREMENT EDUCATION

Transitions – In collaboration with the Office of Benefits Administration, retirement information was presented to pre-retirees at both UPC and HSC for two days on each campus, consisting of seminars, workshops, and individual retirement consultation on April 26, 27, 28 and 29, 2005. Awilda Bregand, Director of Benefits

Administration, covered: Life Insurance, Accidental Death and Dismemberment, Long Term Care Insurance, Basic Retirement Plan, Medical Insurance, Medicare, Social Security, and Dental Insurance. For the Emeriti Center, Helen Dennis, Specialist in Aging, Employment, & Retirement, spoke on "Becoming the Provost of Your Retirement;" Ed Schneider, Emeritus Professor/Dean, Gerontology spoke on "Ageless Living;" Dagmar Halamka, Emeritus Professor, Marshall School of Business, spoke on "Joy of Law;" Donna Benton, Clinical Psychologist, Director Los Angeles Caregiver Resource Center spoke on "The 3 R's: Relax, Rejoice, Reconnect;" Bob Scales and Betty Redmon spoke on the "Job of Retirement;" Betty Redmon and Mitzi Tsujimoto spoke on "You and USC – Connecting for Life." Bob Scales moderated a panel of USC Retirees in a session entitled "Retirement – The Adventure."

Seminars co-sponsored with the USC Credit Union. Growing from discussions and topics of the Retired Faculty/Staff Benefits Committee, Lara Mirzaian of the USC Credit Union organized and hosted lunches for two seminars designed specifically for retirees but open to all employees. Topics were tax law and estate planning.

H. DALE HILTON LIVING HISTORY PROGRAM

Interviews were videotaped: Peter Berton of International Relations was interviewed by Gordon Berger; Gordon Cohn of the Keck School of Medicine was interviewed by Leonard Wines; Paul E. Hadley of the Emeriti Center-Emeriti College was interviewed by Harriet Servis; Paul E. Hadley of the Association of Retirement Organizations in Higher Education (AROE) was interviewed by Harriet Servis; Dorothy Nelson of the School of Law was interviewed by John G. "Tom" Tomlinson, Jr.; Alvin Rudisill, Alvin of the School of Religion was interviewed by Robert Biller; Irving Rehman of the School of Medicine was interviewed by Phil Manning. Videotapes may be checked out from the Andrus Gerontology Library and are archived in the University library system.

EMERITI COLLEGE

Lecture Series. Community outreach and service continued to dominate programs of the Emeriti College during 2004-5. Our popular public participation lecture series continued to be the centerpiece of college activities with dedicated emeriti faculty conducting a total of 62 lecture/discussions on a wide variety of topics at nearly two dozen senior and community centers throughout the Los Angeles area. The Emeriti College also acquired three new speakers. The Emeriti College had continuing planning sessions for an on-going lecture series at the Los Angeles Central Library and with USC Alumni groups for lectures presented from the ranks of both active and retired faculty.

Emeriti Research. The Emeriti College continued to encourage retired faculty to apply for the available research grants to further the development of their scholarly projects. Clancy Sigal and Norman Levan received research grants, and Michael Fry utilized funds for undergraduate student research assistance for works in progress. The Emeriti Center is grateful for the generosity of the Kenneth T. and Eileen L. Norris Foundation as well as the Morris S. Smith Foundation for enabling retirees to continue their research and publish results.

Honorary Lectures. Two Emeriti Center-Emeriti College lectureships were presented in 2004-5. On October 26, 2004, Robert T. Singer, Curator and Head of the Japanese Art Department at the Los Angeles County Museum of Art spoke on "What Makes Japanese Art Unique," in the 6th annual Inamoto Lectureship, honoring the memory and scholarly contributions of Noburo Inamoto. On March 10, 2005, Frances Lomas Feldman gave the 9th Annual Borchard Lectureship, which recognizes a professor Emerita or Emeritus who has achieved distinction through continuing scholarly production of high order. Her lecture was entitled "A Natural Optimist Grows Up with Los Angeles."

Mentor Program. Six retirees met with students from the Emerging Leaders program and continued to be mentors throughout the academic year.

**RETIRED FACULTY ASSOCIATION (RFA)
and
STAFF RETIREMENT ASSOCIATION (SRA)**

This was a landmark year for reevaluation of the Emeriti Center's relationship to the two retirement associations (see USC Retiree Community Strategic Plan, above), with evolving plans for new cooperation and support. Mutual exchange of association Board and Emeriti Center Council memberships and co-sponsored events continued. The Emeriti Center incorporated the RFA membership data into its database and received and processed RFA membership dues, as well as providing other administrative and programming assistance. It helped arrange the SRA-RFA co-sponsored Homecoming Booth. The RFA and SRA, respectively, co-sponsor with the Emeriti Center, university-funded luncheons honoring new retirees. The faculty luncheon in November, under the leadership of Bob Filep, featured newly hired scholars, recently retired scholars, and scholars who had been retired for several years. New retirees were introduced and presented with a copy of the book *Trojan Gallery* and a letter from Provost Armstrong. Ms. Redmon presented the Leibovitz Faculty Award for Service to Seniors to J. Tillman Hall. The staff luncheon was held in March and featured the individual recognition by Senior Vice President Dennis Dougherty of new retirees. Ms. Redmon presented each new retiree with a copy of *Trojan Gallery* and a letter from Mr. Dougherty. Carol Gustin was recognized as the first recipient of the Emeriti Center's Volunteer Community Service Award. A gift was presented to Joan Ewing for her years of faithful service as coordinator for the H. Dale Living History Project, the responsibility now passing to recently retired librarian and archivist John Ahouse. The Leibovitz Staff Award for Service to Seniors was awarded to Alice Donohue and H. Frank Chew. Mr. Chew spoke on volunteer service and his work with the Red Cross Mental Health Disaster Response Team.

INTEREST GROUPS AND OTHER EVENTS

The USC Retiree Book Club chaired by Glenn and Eileen Hamor, held monthly meetings, with announcements mailed from the Emeriti Center to interested retired faculty and staff as well as a number of current USC employees. Lora Walker led the discussion of Barack Obama's best-selling book *Dreams From My Father*. The Book Club then discussed Dorothy L. Sayers' mystery novel, *Gaudy Night*. One month, attendees were offered the opportunity to discuss briefly a book which they have recently read. The Book Club also discussed Tony Hillerman's memoir entitled *Seldom Disappointed* and Walter Mosley's novel *Little Scarlet*. Norman Sigband led the discussion of Ron Chernow's acclaimed biography, *Alexander Hamilton*.

USC Day with Einstein – In association with the "Einstein in California" exhibition at the Skirball Center TIAA-CREF and the USC Emeriti Center sponsored a panel discussion, reception and private tour of this exhibition, the most comprehensive presentation ever mounted on the life and theories of Albert Einstein. Included on the panel were Ze'ev Rosenkranz from Cal Tech, editor of the Einstein Papers Project and author of Einstein Scrapbook, whose topic is "With Fame I Become More and More Stupid: Albert Einstein on Celebrity, Relationships and Nationhood;" Marsha Kinder, executive producer/director of The Labyrinth Project, an art collective and research initiative on interactive cinema and database narrative at USC's Annenberg Center for Communication, Kinder, University Professor in the School of Cinema-Television, will speak on "Three Winters in the Sun: Einstein in the Labyrinth" (on Einstein's three winters in Los Angeles) which is included as part of the exhibit.; and Nicholas Warner, professor of physics and mathematics in USC College, who will present (for the layman) "Einstein: From Relativity to Unified Field Theories." The moderator was USC emeritus professor Robert P. Biller, former Chief Operating Officer of the Skirball Center.

90th Birthday Party – On July 28, 2004, the Emeriti Center celebrated Director Emeritus Paul Hadley's 90th birthday. Food for the potluck luncheon was provided by the Emeriti Center and invited guests. About 75 people attended, including six other nonagenarians. Several guests recounted fond memories of Dr. Hadley during his tenure at USC.

PUBLIC RELATIONS

Campus Collaboration. Martha Harris and Susan Heitman loaned the services of Christine Shade to cover retiree events in *The Chronicle* and to review the H. Dale Hilton Living History tapes as a resource for USC's 125th anniversary. Her services will be available for one additional year. Meetings with directors or representatives from Payroll, Personnel, ISD, Parking, Auxiliary Services, Protocol & Events, Annual Giving, Planned Giving, Staff-Faculty Counseling Center, and Alumni Association established better operational mechanisms and continued to build an internal contact network. Associate Provost for Faculty Affairs Martin Levine provided wise counsel and encouragement at monthly meetings with Ms. Redmon accompanied on occasion by Bob Scales. Ms. Redmon, Dr. Scales, Bob Biller, Mitzi Tsujimoto, Bob Coffey, and/or Carole Gustin met with all Senior Vice Presidents and various members of the Provost's staff (see USC Retiree Community Strategic Plan, above).

National Publicity. The national media is increasingly reporting on retirement activities and services at colleges and universities. USC is a major source, and Betty Redmon and Bill Faith were quoted in several articles. USC Emeriti Center was featured in a case-study article "Continuing the Connection: Emeriti/Retiree Centers on Campus" written by Shelley Glazer (UC-Berkeley), Ms. Redmon, and Karen Robinson published in the peer-reviewed journal *Educational Gerontology* (31:363-383, 2005).

Networking with Other Universities. The USC Emeriti Center continues to respond to requests from other universities who wish to establish or expand services to retirees. Ms. Redmon continues to collaborate with the director of the retirement resource center at UCLA, and attended, along with art lecturer Karen Lansky, UCLA's 27th Emeriti Faculty Art Show. Ms. Redmon visited and retains an active sharing of information and resources with the retirement center at UC-Berkeley, as well as with the other institutions affiliated with AROHE.

VOLUNTEER SERVICE

Associate Director of Administration Mitzi Tsujimoto continued to support retired staff activities and to coordinate volunteers who supported many Emeriti Center programs.

Total Volunteer hours recorded this fiscal year: 3100 hours.

Volunteer Committees Include: Emeriti Council; Joint Committee; Staff/Faculty Benefits Committee; Staff Retirement Association Board; Retired Faculty Association Board and Executive Committee; Emeriti College Advisory Committee; Advancement Board, Inamoto Lecture Committee; Borchard Lecture Committee; Leibovitz Service Award Committee; Emeriti Research Grants Committee; Volunteer Community Service Grants Committee, and 25th Anniversary Committee. Volunteers also assisted with the annual telephone campaign and mailings.

Individual Volunteers--Staff and Faculty: Volunteers included Hermine Fermanian, Mary Ann Harada, Eva Young, Carol Gustin, Beverly Rhue, Anna Ward, Eileen Utecht, Irene Lee, Madaleen Smith, Florence Hayano, Sadye Lawson, Joan Mason, Harriet Servis, Joan Hill, Joan Ewing, Mike Halloran, Sherman Gillespie, Sally Emerson, Len Wines, Ginny Ainsworth, Helen Jones, Ron Violette, Howard Saperston, Tony Lazzaro, Gil Siegel, David Mars, Joan Banes, Howard Hansen, Bob Coffey, Phil Manning, and Robert Biller.

Leibovitz Awards for Volunteer Service to Seniors were awarded to J. Tillman Hall, Emeritus Professor of Physical Education and Emeritus Director of the Emeriti Center, and to Alice Donahue, retired from Payroll Services, and Frank Chew, retired from the School of Business. Awards were presented by Betty Redmon at the Provost's Luncheon for New Faculty Retirees and the Staff Recognition Luncheon for New Retirees, respectively. Each recipient received a certificate and \$500 check, made possible through a grant from the Leibovitz Foundation.

Volunteer Community Service Grants. Also with funds from the Leibovitz Foundation, the Emeriti Center launched new grants for expenses that would otherwise come from retirement income to assist USC retirees in their performance of volunteer community service. Carole Gustin received the first award of \$500 to buy

materials for making decorated caps for critically ill children at Culver City Hospital. Dr. Evelyan Thomas was awarded \$1,000 to help pay for air travel to Africa where she runs cancer-screening clinics in underserved areas.

FINANCIAL EFFORTS AND REPORT

Major Donors. In an ongoing process, much effort was made to attract major donors to the Emeriti Center through luncheons, meetings, correspondence, and outside social occasions. Through the influence of Bill Faith, an endowed position was gifted to the University, albeit to another unit more closely matching the interests of the donors.

Associate Director for Development. In late spring, Bob Biller graciously accepted the position of Associate Director and agreed to help lead fundraising efforts.

Payroll Deduction into Endowment. The mechanism was established and first utilized for funds from active faculty and staff to be received into the Emeriti Center Endowment Account via payroll deduction.

Emeriti Center Advancement Board met each month in this its 3rd year of existence. Serving were Timothy Brown (Chair), Brent Brockermeyer, Carla Cotti, Bruce Juell, Karla Kraft, Sheila Wilcox (replacing Holly Kendrick), Sandra Lash, Karen Malkoff-Hatton, Kimberly Pease; along with retirees and staff Rod Dedeaux, Bill Faith, Frances Feldman, Paul Hadley, Michael Halloran, Tony Lazzaro, Jane Page, Betty Redmon, Alan Rowe, Bob Scales and Mitzi Tsujimoto. Ms. Lash sponsored the first session of "Talking Together" (see Emeriti College, above). Establishment of a support group was extensively studied, with a final decision that efforts and resources could be more profitably directed elsewhere. Bob Biller joined the group in the spring and helped lead a self-evaluation of the Board's mission and accomplishments, resulting in the recommendation that the Board be dissolved and reconstituted as a Community Advisory Group.

Financial Summary. General funds available for Fiscal Year ending June 30, 2005, were \$303,945: Balance Forward (11%), USC Office of the Provost (72%), Individual Gifts (12%), Lecture Site Fees (3%), Foundation Grants (2%), Endowment Interest (1%). Foundation Grants were received from the Albert and Elaine Borchard Foundation (\$1600 for the Borchard Lecture) with pledge for continued funding through 2009, and the Kenneth T. and Eileen L. Norris Foundation (\$5,000 for Emeriti and undergraduate research grants), with a renewal grant pending. The USC Credit Union produced two co-sponsored lunch seminars. TIAA-CREF produced USC Day with Einstein. Special acknowledgement goes to individual donors, primarily retirees contacted by mail or phone, who contributed a total of \$36,172.

NEW FACILITY

New administrative building plans and inclusion/exclusion of the Emeriti Center as a tenant are still pending.