

Minutes*

**Senate Committee on Faculty Affairs
Tuesday, October 2, 2012
2:30 – 4:30
238A Morrill Hall**

Present: Scott Lanyon (chair), Ben Bornsztejn, Arlene Carney, Dann Chapman, Linda Chlan, Randy Croce, Sophia Gladding, Tabitha Grier-Reed, Joseph Konstan, Frank Kulacki, Theodor Litman, Rishhab Mishra, Benjamin Munson, Joe Ritter, George Sell, Pamela Stenhjem, James Wojtaszek

Absent: William Beeman, Kathryn Brown, Jennifer Fillo, Carl Flink, Karen Miksch

Guests: Professor Barbara Elliott (past co-chair, Committee on Academic Freedom and Tenure), Vice President Aaron Friedman; Dean Mary Nichols (College of Continuing Education)

[In these minutes: (1) subcommittees; (2) report on hiring and tenure & promotion; (3) clinical faculty procedures document; (4) update on the Encore Transitions program]

1. Subcommittees

Professor Lanyon convened the meeting at 2:30 and reported that two subcommittees have been appointed, one on the policy on Academic Appointments with Teaching Function (that deals with college personnel policies)(Professors Chlan, Munson, and Wojtaszek) and one on leaves and sabbaticals (Professors Konstan and Ritter).

2. Report on Hiring and Tenure and Promotion

Professor Lanyon turned next to Vice Provost Carney for a review of hiring and promotion and tenure.

Dr. Carney reported that she presents data to the Board of Regents every May on promotion and tenure; she presents three reports: (1) faculty on the tenure track promoted from assistant to associate professor with tenure and promotion from associate to (full) professor; (2) clinical faculty (primarily in the Academic Health Center [AHC]) promotions; and (3) promotion for Academic Professionals with continuous appointments (most of whom are librarians). On the last, Professor Lanyon asked if such appointments are still being made. They are, Dr. Carney said, and most are in the libraries.

While the reports are presented in May, faculty members are already asking for external-review letters for the following year, so the question-and-answer time for her is 12 months. If someone is denied tenure, she is the respondent in any cases that go to the Senate Judicial Committee. During the fall she answers questions (by the hundreds, and there are always new questions every year).

* These minutes reflect discussion and debate at a meeting of a committee of the University of Minnesota Senate; none of the comments, conclusions, or actions reported in these minutes represents the views of, nor are they binding on, the Senate, the Administration, or the Board of Regents.

When she reports to the Regents, Dr. Carney related, she also reviews the tenure process because sometimes there are new Regents and she wants to be sure that the Board knows that it is a rigorous annual review process that includes external letters and that the person can be terminated before the end of the probationary period. The University's process is very different from that in the K-12 system; here it is basically a meritocracy and advancement depends on merit. The decision to promote and grant tenure is reviewed at multiple levels.

There were 158 files last year; she reads all of the files except those for the faculty in the bargaining unit at the Duluth campus (those files are reviewed by the chancellor). She reads all Twin Cities files, including those from the AHC starting in 2011 (after the position of Senior Vice President for the Health Sciences was eliminated). Also last year, the decision was made that only the AHC colleges would decide on promotions for clinical faculty. Last year she looked at about 115 files (less than the 158 because, as noted, she does not review Duluth or clinical faculty files), which was low; this year the number could be higher, in part because a larger number of associate professors are being promoted—which is a good thing. In 2005 about 38% of the associate professors had been in that rank for more than eight years; last year it was about 31%, so more are being promoted.

Whenever there are difficult cases, such as a split vote in a department or a "no" vote, they go to the provost's office. She reads all of them to ascertain whether there were any procedural errors; if she finds any, a re-review must start immediately because she does not want the provost to make a decision about a case in which there has been a procedural error. (She only reviews cases on procedure, not on the merits.)

Professor Lanyon asked what happens when a department makes one recommendation and the college makes a different one. There have only been a few such cases, Dr. Carney responded, where the department said "yes" and the dean said "no." Those cases come to the provost's office as well, and inevitably the provost will have to overturn someone's recommendation. The tenure policy requires that if the provost makes a decision different from that of the department, he or she must write a letter to the faculty in the department explaining the decision. In one such case, the external letters changed the day because they were overwhelmingly negative. In the book disciplines, it may be that the annual reviews are good because the book is in progress, but at the end of the probationary period the book still hasn't appeared, at which point external reviewers will not see sufficient material in the file to make positive recommendations.

The more difficult cases are when there is a split vote in the department, Dr. Carney said. There may be two strong opinions, so one wonders if the department has two wings, but there also may be genuinely different views about a candidate. It is a problem if the department report is positive but there are many negative votes, which means that no one spoke up during the discussion. The tenure policy allows the provost to convene a special committee, composed of members generally not from within the college, which looks at the department's 7.12 statement and the dossier and provide advice to the provost. Each case is examined very carefully, so when the provost overturns a decision, it is usually because of a split vote in the department. Where the department report is positive but there are a lot of negative votes, she will tell the department that is unfair to the candidate because there is nothing he or she can defend against. The procedures document now calls for a majority and minority report when there is a split vote.

Professor Konstan said it would be helpful for this Committee and for the Committee on Academic Freedom and Tenure to have a numeric summary of the dean-versus-department, dean-versus-

provost, and split vote cases. Dr. Carney agreed and said she has reported the data to Academic Freedom and Tenure; she also observed that there has never been a case where the department and college make positive recommendations and the provost reverses them. How many split votes are there, Professor Konstan asked. A few every year, Dr. Carney responded, but in most cases if there is negative feedback on annual reviews, the candidate will leave before reaching the decision year.

Professor Kulacki noted that the "tenure success rate," for incoming cohorts, is 55-59% for the three-year rolling averages. How does that compare with the University's peers? Most do not report those data, Dr. Carney said; the University does because it is a report that Michigan also uses. The University's tenure success rate numbers are very close to those of Michigan. Is that a reasonable attrition rate, Professor Kulacki asked? Dr. Carney said she believed it is, based on reading annual reviews. She pointed out that the number includes faculty members who are recruited away.

What has plagued her is that much of the documentation is still on paper, Dr. Carney said. She has long asked for an electronic system for annual reviews. Such a system would be helpful for answering questions about the process; right now she has to do a discourse analysis to answer them. They now scan all documents so they have a better sense of the tenure success rate. Her conclusion is that in most attrition cases, the problem is a lack of fit; some leave because they are not thriving but there are also some recruited away.

Dr. Carney said that in workshops for probationary faculty members, she has asked them what it means, in their view, when there is a 100% favorable vote for continuing a probationary candidate (departments are not required to have such votes) even though serious concerns have been expressed. They almost all say that the vote means there is no problem. Two units do things differently. Applied Economics uses a three-point scale to evaluate probationary faculty: below expectations, meets expectations, or exceeds expectations. Then there is a vote on continuation. That kind of process can convey concerns. In the Carlson School they use a five-point scale for teaching, research, and service, which also provides more information to the probationary faculty member.

She will have a workshop on annual reviews, on which departments have a mixed record. In a few cases, the annual reviews can be positive each year—and then the vote is to deny tenure. Some annual reviews are uninformative. But a 100% positive vote for continuation may convey the message that there are no major concerns, which may not be true.

Professor Ritter said his department had contract faculty for a number of years and they provide a lot of flexibility in how they are used and defined. But there are not many outside the AHC. Is there a standard process to handle contract faculty? There is not, Dr. Carney said; it is college-specific. Contract faculty are defined in the tenure policy but the policy says nothing more about them. In the AHC, there are criteria for promotion in each rank, as there is in the College of Design, but not in many other colleges (primarily because there are so few contract faculty). If there are longer-term contract faculty serving in a unit, it make sense to have a hierarchy for promotion. In some units, contract faculty are only hired for a year or so.

Vice President and Dean Friedman joined the meeting at this point (for the next agenda item) and observed that there are clinics in both Veterinary Medicine and the Medical School—and the last thing they want is constant turnover in clinical care. The schools have reason to want those people to stay because they may be very effective clinicians.

3. Clinical Faculty Procedures Document

Professor Lanyon welcomed Vice President and Dean Friedman and (by telephone) Professor Elliott to the meeting to discuss the desirability of developing a procedures document to guide promotion decisions for clinical faculty members. He noted that this came up last year; the Committee on Academic Freedom and Tenure (AF&T) developed a detailed promotion and tenure procedures document for tenure-track and tenured faculty but not one for clinical faculty members. He asked Professor Elliott to provide background.

Professor Elliott said that AF&T had developed the procedures document for tenured and tenure-track faculty pursuant to the provisions of the tenure policy. But the University also has clinical faculty around the University, in the Medical School and elsewhere, who are on promotable tracks independent of tenure. Those faculty members do not have the benefit of a procedures document to guide the process of granting promotion, although some units have 7.12-like statements that contain the criteria to be met for promotion. The procedures document for tenured and tenure-track faculty is very detailed and useful for those going through the process and aiding in dealing with problems. Having a written document makes things clearer, so AF&T brought the question of such a document for clinical faculty to this Committee (because responsibility for it falls more clearly within the bailiwick of this Committee than AF&T).

Professor Elliott asked Dr. Carney where there are promotable clinical or contract faculty. Dr. Carney said they are primarily in the College of Design, the Humphrey Institute, CFANS, as well as in the AHC.

Professor Lanyon asked Dean Friedman for his perspective.

Dr. Friedman said that with respect to the Medical School, Professor Elliott understated the extent of the processes in place for clinical faculty members. First, it is not just a loose understanding of how clinical faculty are treated with regard to review and promotion. They require an annual review for clinical assistant professors and essentially use the same form that they do for tenure-track probationary faculty members; they try not to handle the two groups differently in terms of process, even though the outcomes are different. It may be that the review of a clinical faculty member will be conducted by tenured faculty members. But they do require that the form be completed. Second, the Medical School has a separate promotions committee for clinical-track faculty members, so it is not just a department decision. There is review by the senior clinical faculty and then a decision by the School that is transmitted by the dean to the provost's office.

Dr. Carney said that the issue came up at AF&T, but with the thought that there should be a shorter document that puts in writing essentially what Dr. Friedman just said. New clinical faculty members could be handed the document and told "here's what we do." It would be a parallel document to that that exists for tenure-track/tenured faculty members. The document would probably not be the same for every college; tenure-track/tenured faculty members are governed by the tenure policy but there is need for a short document for clinical faculty members.

Professor Kulacki said this discussion raises the question of parallelism across college for contract or clinical faculty and the need for comparisons to help the Committee. He said he could see the

possibility of other collegiate units using clinical or contract faculty in the future. Dr. Friedman said that in the AHC the processes are not identical, although they are very similar. There are different degrees of specificity within colleges, Dr. Carney said, depending on the number of contract faculty members they have. The question from Academic Freedom and Tenure is whether it is possible to have a general document that sets the criteria for promotion so that people do not get stuck in place and that requires annual reviews. The rest can be left up to the colleges.

Professor Chlan said in the School of Nursing, clinical faculty members have a significant teaching role that is related to accreditation, and the criteria for them look different from those for the tenure-track/tenured faculty. So any criteria in an institutional document would need to be quite general. Having guidance would be helpful for colleges that do not have many contract/clinical faculty, Professor Lanyon commented, and could inform them that they must be more specific than the institutional document.

Professor Konstan asked if there is a difference between the evaluation of non-tenure-track/tenured faculty and of faculty-like P&A staff. Dr. Carney commented that use of the phrase "faculty-like P&A" can be confusing. Everyone at the University should have an annual review but the format can vary. The process is quite formal for probationary tenure-track faculty members but as she pointed out earlier, the tenure policy defines contract faculty but not provide for them or discuss promotions for them. The Human Resources web site says that everyone is to have performance reviews; they are general and colleges can make them more specific.

Professor Konstan said that, per Dr. Carney, a unit can have more specific criteria, which envisions similar evaluations. A department could have teaching faculty, research faculty, clinical faculty; is a policy being developed that would prevent anyone from being hired into a position with no opportunity to be promoted while others could be hired into a position with a career path? That would not necessarily be true for faculty lines, Dr. Carney responded; there are teaching assistant professors, teaching associate professors, teaching professors, similarly for research professors, etc. This is not willy-nilly. In the annually renewable P&A classifications, there is more discussion about the need for academic ladders that people can move up (which do exist for the continuous P&A appointments). There are P&A positions, such as "coordinator," that include a huge range of jobs and salaries. Human Resources is working on that issue; there is recognition that the P&A category needs a re-look. It grew quickly but ladders weren't established. They always exist for faculty appointments, however.

Professor Konstan said he thought an Instructor appointment was faculty. It is, Dr. Carney said, but if an instructor is hired on the tenure track, the person can only be in that rank for two years and only if he or she has not finished the terminal degree. If the degree is not completed within the two years, the person is terminated. There are contract instructors, but they have the opportunity to be promoted to contract assistant and associate professors.

The School of Nursing and the Medical School have clearly-defined paths, Dr. Carney said, but others are not so clear (except the Department of Design, Housing, and Apparel).

Mr. Croce said this discussion raises significant P&A issues. There was a committee that looked at them and discovered there are a number of cases where a P&A staff member has no opportunity for advancement. In part that was related to the distinction between P&A and Civil Service staff, and one

radical idea was to eliminate the distinction and create a ladder for jobs. This is an issue that is being addressed glacially.

Professor Ritter said that in colleges outside the AHC the structure of the job of contract faculty members is up to the department and it is not being used in a way consistent with policy. They are regarded as temporary and there is often no clear basis for continuation. This is a problem, although it is not a big one outside the AHC.

Professor Munson asked if there is an expectation, once a document is in place, that all contract faculty would have a ladder and that there will be some provision that allows contract faculty members to move into a qualitatively different position? Dr. Carney responded that she only deals with faculty positions; anything to do with P&A appointments rests in Human Resources (except that the provost must approve continuous appointments), so she would not want to speak about them.

Mr. Chapman agreed with Mr. Croce that the movement has been glacial, in part because they do not have the resources to make changes, but the process is being hurried up. He said, in response to Professor Munson, that the intent is that at the end of the process, there will be clear career tracks, whatever position one is in, and meaningful titles.

Professor Kulacki said that the role of this Committee might be to obtain the best documents it can and coordinate with Human Resources on dealing with faculty-like P&A staff and with Dr. Carney on clinical or contract faculty. Dr. Carney pointed out that one is either appointed as a faculty member or not, and if so, on the tenure track or not, but people tend to get things mixed up. If one is a faculty member, one is tenure-track/tenure or contract. One issue is why people are hired on different job codes differently across colleges; that is because the University is decentralized. If someone asks her a question about a position, if it is not a faculty job code or about a continuous P&A appointment, she will refer the person to Human Resources.

Professor Konstan said that Professor Munson asked about a substantive change in position. He has not had a change in his position description in 20 years, nor has he looked for one. Except for occasional peripheral tasks, there is no career progression for faculty members; they do the same job. Perhaps they are like coordinators. Will any document governing the hiring of contract faculty members say that the position must have certain properties to be a faculty appointment (e.g., what if there is no teaching? Or no research?)? Is there a definition of a faculty position? Dr. Carney said one can find it in section 3 of the tenure policy.

[<http://www1.umn.edu/regents/policies/humanresources/FacultyTenure.pdf>]

Ms. Stenhjem said that she had been hired into a position with nowhere to go and had to be reclassified—a long process—because it was the only way she could receive a promotion. There are a lot of hoops for P&A staff if they are in the wrong position. There is no standardization in the review process, and because P&A appointments are annual and a person can be non-renewed without cause, P&A staff need the annual reviews to demonstrate that they were doing their jobs. Without them, they cannot grieve. With respect to job classes, she has seen no consistency in job titles. Many P&A staff are called faculty-like and do a lot of faculty work; the University never expected these employees to be permanent but they are now the largest class of employees and have the same benefits as the faculty. P&A staff need help with these issues because they are an unprotected class. If the P&A staff were to go,

the faculty would have to take back a lot of work they do not want. The P&A employees could use the help of the faculty.

Professor Lanyon said he would work with Human Resources and Vice Provost Carney and would appoint a subcommittee to prepare a draft. (Professor Gladding volunteered to serve.) Dr. Carney agreed that the existing procedures for tenure-track and tenured faculty would be a good place to start, although it has much more detail than would be needed in the parallel document for clinical faculty. Professor Lanyon asked Dr. Carney to review the policy to see where there are issues that the clinical faculty need to have addressed.

4. Update on the Encore Transitions Program

Professor Lanyon now welcomed Dean Nichols to provide an update on the Encore Transitions program, "Preparing for Post-Career Life." [Information about it can be found at www.cce.umn.edu/university-encore-transitions]

Dean Nichols said she appreciated the interest in the Encore Transitions program, which is available to faculty and staff. A second round of invitations to those who are eligible for this year's offering have just been sent out in the last few weeks. Faculty, P&A staff, civil service staff, and bargaining unit staff on all campuses who have at least a 75% time, benefits-eligible appointment are eligible to request and receive support from their unit if they meet one of the following criteria: (1) they are 50-54 years old with 15 or more years of service at the University; (2) they are 55 years old or older with 5 or more years of service at the University; or (3) have 30 years of service at the University, regardless of age. The College of Continuing Education is working in long-term partnership with Human Resources to present the course; this is the third year it has been offered and it has a great turnout. It is now being opened to the public (in part so that partners/spouses can attend). Dean Nichols noted that it is estimated that 10,000 baby boomers per day will be retiring in the next 20 years, so courses like this will be needed.

Dean Nichols reported that the course has been described in one recent book as a pioneering program not seen elsewhere in the country. The notion is that it helps people with their encore after they conclude their primary career. Former Vice President Carol Carrier was interested in a holistic approach to people and their careers and the Encore Transitions course reflects that interest. Most people see retirement as an event—which they approach with fear. If one sees it as a transition to another phase of life, and tries to imagine what one can do, one can develop a modest goal of reinventing oneself in a way that can be very exciting.

The course takes place on four full Fridays in October and November. The cost is \$500 for eligible faculty and staff for all four, or one can take one day's class for \$150. The four sessions deal with pathways to post-career life, aging well and being well, making the most of post-career life: money, working, helping, and launching your future/living your encore life.

Dean Nichols reviewed the description of the course and said that as they developed it, they found what was important to people and incorporated those elements in the course. "An encore transition offers an opportunity to explore and invent the next stage of our lives. What might a meaningful post-career life look like for me? What are my preferred routes for getting there? Will I have enough? Will I want or need to continue working? How will I maintain a sense of purpose in my daily life?" She also

noted the presenters used in the course, including experts on creativity and sustainability, physicians and psychologists, financial experts, social entrepreneurs, and many people who lead interesting encore lives.

Dean Nichols provided copies of some of the material describing the course.

Course overview:

- Explore where you might want to go to from here.
- Ask timely financial questions about Social Security, Medicare, and “having enough” for the next stage.
- Find out what makes for healthy longevity.
- Explore post-career work.
- Learn about the personal and community benefits of helping others, and learn how to get involved.
- Discover an array of ways to live a connected, outward-looking, engaged life.
- Meet people from our local community who are creating interesting and inspiring post-career lives.

Benefit from:

- Inspiring presentations by outstanding experts, engaging activities, and thoughtful discussions.
- Comfortable interaction with fellow participants, presenters, and facilitators in a relaxed environment.
- Concrete tools and skills for navigating transition and shaping a personally meaningful next stage.
- Carefully selected resources, both printed and online, exclusively for Encore Transitions participants.

Come away with:

- Greater clarity about what your next stage might look like.
- Options, opportunities, and personal strategies for getting there, including the beginning of a plan or two.
- Less fear of the future and enhanced ability to take positive risks.
- Renewed purpose, greater meaning, and deeper satisfaction with life and work now and into the future.

More information is appended to these minutes.

The comments of some of the people who have taken the course are moving, Dean Nichols said, and she provided a sampling. The course got people thinking in a positive direction, and facilitated meaningful exchanges among colleagues approaching similar transitions.

They do not offer the course in the spring, Dean Nichols said in response to a question. If the invitations come out in the fall for a fall course, that does not provide much warning if people must have time off or must work around a teaching schedule, one Committee member observed. Dean Nichols agreed those can be a problem; the first notice of the course is sent out in August.

Professor Lanyon asked about the number who can take the course and if it is at capacity. About 60-75 people are at any one session, Dean Nichols said, and capacity is about 80. [Subsequent to this meeting, the course filled to capacity.]

Professor Konstan suggested that a similar course for people who have, for example, been at the University for 20 years who decide they may not want to finish their career here and who want to start a new career. Has she thought about a pre-encore class that would allow people to think about changing careers? They have no plan for such a course, Dean Nichols said, and the earliest one can take the Encore Transitions course is at age 50 with 15 years of service at the University. She agreed, however, that a mid-career course could invigorate people. Professor Konstan said it would be nice for people to be here a long time and not by default, because they explored other options and decided to stay.

Professor Bornshtein asked if they have considered alternative ways to deliver the course. They have, mostly with respect to the other University campuses, Dean Nichols said. But that is expensive to make happen and, in addition, people would lose a lot in the translation via UMConnect. They do put the audio of some programs on their web site and will explore creative possibilities for campuses other than the Twin Cities. She agreed that it is not reasonable to expect people from the other campuses to always come to the Twin Cities.

Professor Lanyon said that they could tell the participants in the course to encourage people in their units to consider it. He agreed with Professor Konstan that the earlier one talks about the options, the better.

Vice President Carrier was wonderful in helping to get this started, Dean Nichols reported, and Vice President Brown has been a big supporter. They did a seminar at the American Council on Education on the program and also offered a program for Hennepin County employees that was very successful. There is a lot of interest in the course and the University is in a position to promote it.

Professor Lanyon thanked Dean Nichols for her report and adjourned the meeting at 4:10.

-- Gary Engstrand

University of Minnesota

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Fall 2012 Schedule, Session Descriptions, and Presenter Biographies

SESSION ONE: PATHWAYS TO POST-CAREER LIFE

Friday, October 19, 2012

Satisfying encore transitions may be marked by life-changing beginnings and endings, but they are bolstered by continuity. In this session, you will trace your journey up to now, consider what's worth keeping and changing for the future, and look ahead to the routes (and detours!) you might encounter as you create pathways to the next stage. Highlights include:

MORNING

- **The Road to What's Next** with travel writer Catherine Watson. Hear about Watson's ongoing journey toward her "encore life," learn about personal narrative as a way to make sense of the past and navigate the surprises and challenges that lie ahead, and start writing your transition memoir on the spot and as it happens.
- **What are Encore Transitions Anyway, and Why Are They So Important?** with Encore Transitions co-founders Andrea (Andy) Gilats and Bill Spinelli. What makes for a purposeful transition into a "new stage" of life, one that didn't exist before our current longevity revolution? What makes for satisfying, meaningful "encore life?"

LUNCH AND CONVERSATION WITH YOUR TABLEMATES

AFTERNOON

- **Mind Mapping Our Lives** with consultant and coach Donna Bennett. Mind mapping is a form of intentional wandering that helps you see where you've been, where you are now, and where you might want to go. What are the major themes of your life up to now? What do you want to stop, start, and continue? With whom? Where?
- **Exploring Values, Strengths, and Passions** with Donna Bennett. By the time we're ready for an encore transition, we may no longer want to do what we've always done or even what we've always been good at. Knowing what's most important to you right now is crucial if you want to start moving forward. By assessing your strengths, identifying your deepest interests and passions, and clarifying your values, you can begin aligning your dreams and priorities with your life circumstances to create options and possibilities for the future.

SESSION TWO: AGING WELL/BEING WELL

Friday, November 2, 2012

Did you know that as we get older, we become less like each other? This gives us the chance to define good health for ourselves. During this session, you will explore the physical and social aspects of positive aging, and learn about the roles of resiliency, wellness, and well being in healthy longevity. Highlights include:

MORNING

- **Positive Aging** with family physician and Encore Transitions co-founder Bill Spinelli. Aging is not, by definition, a disease, condition, or descent into frailty and dependence. Your eyes will be opened during this easy-to-swallow overview of the aging process, including physiology, brain changes, and social positioning. Learn how to cultivate health consciousness and body awareness, and discover what makes for healthy longevity.

- **Engaged As We Age** with Encore Transitions co-founder Andrea (Andy) Gilats. Get a sampling of the latest research into vital aging and discover why activities like working, helping, socializing, and learning, as well as motivators like autonomy, mastery, and purpose are keys to satisfaction and happiness later in life. You'll also learn about the "Third Age" as a time of personal fulfillment and second chances, and use a newly developed tool to start shaping your life for personal satisfaction and healthy longevity.

LUNCH AND CONVERSATION WITH YOUR TABLEMATES

AFTERNOON

- **The Roots of Resilience** with integrative psychiatrist Dr. Henry Emmons. What are the elements of a resilient life? How do life balance, meaningful connections, and joy contribute to resilience? Discover how resilience helps us stay whole through, and bounce fully back from, life's expected and unexpected changes and challenges.
- **The Doctors Are In!** Enjoy a Q & A with Drs. Emmons and Spinelli followed by informal conversation and a special book-signing with Henry Emmons.

SESSION THREE:

MAKING THE MOST OF POST-CAREER LIFE: MONEY, WORKING, HELPING

Friday, November 16, 2012

The three most common questions asked by participants in Encore Transitions' pilot course were, "How do I start planning?," "How will I spend my time?," and "How will I create meaning?" This session looks at options and possibilities for answering all three questions. Highlights include:

MORNING

- **Timely Financial Questions** with financial planner Mark Fischer. What should you know about Social Security and Medicare? How will you make your money last through your lifetime? What questions should you be asking your financial advisor? Knowing what questions to ask as you prepare for an encore transition will help assure that you find the best answers for your situation.
- **Work After Work** with consultant and coach Donna Bennett and Encore Transitions co-founder Andrea (Andy) Gilats. What will be the role of work in your post-career life? Explore trends toward longer working lives and varied exit patterns from career work, including phased retirement, partial retirement, and "unretirement." Learn about bridge jobs,

self-employment, and entrepreneurship. Finally, take a vocational inventory for the next stage.

LUNCH AND CONVERSATION WITH YOUR TABLEMATES

AFTERNOON

- **How Can I Help?** with former St. Paul mayor and SeniorCorps director Jim Scheibel. Studies show that helping others makes us healthier, happier, and longer-lived. What does it mean to work for greater good, whether for pay or not? Learn about traditional and new options for service, volunteering, and other forms of planned helpfulness from someone who is dedicated to making it possible for us to help others.
- **Exercising Your Options** with consultant and coach Donna Bennett. This is a chance to bring the day's learning home to your own life. Using on hands-on exercises, learn how to start seeing options and opportunities for the next stage of work, whether paid or unpaid.

SESSION FOUR: LAUNCHING YOUR FUTURE/LIVING YOUR ENCORE LIFE

Friday, November 30, 2012

Some form of encore transition is an inevitable part of our life course, but how do we go from thinking, considering, worrying, or letting these changes impose themselves on us to positive actions that allow us to steer our own ship and make our own choices? This session will help you take the often daunting leap from thought to action as you move closer toward your encore life. Highlights include:

MORNING

Launching Your Future with architect, educator, and creativity expert Jerry Allan. Who and what can you see yourself being and doing in the future? What are your challenges? What gives you momentum? What one step can you take toward your future right this minute? Using Jerry Allan's amazing "sheets of work," you'll begin actively crafting your encore journey, including identifying and overcoming barriers, seeing options and pathways, focusing in on your best possibilities, and taking action.

LUNCH AND CONVERSATION WITH YOUR TABLEMATES

AFTERNOON

Living Your Encore Life. Meet a diverse panel of people from our community who are creating and living interesting and often inspiring post-career lives. Hear their fascinating and sometimes

surprising transition stories and learn how they are integrating work, helping others, and personal interests and passions into their post-career lives.

Finally, enjoy some ice cream and a lively conversation with panelists and Encore Transitions facilitators in a culminating town hall meeting moderated by College of Continuing Education Dean Mary Nichols.

ENCORE TRANSITIONS FEATURED PRESENTERS

Jerry Allan is an educator, architect, and internationally recognized expert on creativity and sustainability. He is founder and president of Criteria, Inc., an interdisciplinary design firm, and is a professor of visual studies at the Minneapolis College of Art and Design. He also speaks and teaches internationally on creativity, futures, environmental design, and sustainable places. Currently he is working on Pre-emptive Peace, an international sustainability effort.

Donna Bennett is a licensed psychologist, personal and professional development consultant, educator, and author who has worked for corporate, academic, and nonprofit organizations. She is a frequent presenter on work, career, and family life issues, and is the author of *When You Lose Your Job*, a book about the emotional aspects of job loss. In 2005, she received the Minnesota Career Development Association's Marty Dockman Merit Award in recognition of her contributions to the field of career development.

Henry Emmons, M.D., is a practicing psychiatrist who has worked on mindfulness and health realization in medicine, resilience training, and the evolution from clinician to healer. He is the author of two critically acclaimed books on resilience and well being, *The Chemistry of Joy* and *The Chemistry of Calm*. He practices holistic psychiatry, consults with colleges and organizations, and teaches resiliency skills through the Penny George Institute for Health and Healing.

Mark Fischer is a Certified Financial Planner who owns and operates Plan for Life, a fee-based financial planning firm. Since 1986, he has been helping people craft life strategies using an approach that is holistic and research-focused. Fischer holds both a Ph.D. and an MBA, has taught at several universities, has done seminars with numerous organizations, and in 2011, was recognized by *Mpls.St. Paul Magazine* as one of the Twin Cities' Five Star wealth managers.

Andrea (Andy) Gilats, Ph.D., is an educator who has developed and led a variety of continuing education and lifelong learning programs during her three decades in the University of Minnesota's College of Continuing Education. Most recently, she founded the College's LearningLife initiative, as well as Encore Transitions. She has deeply studied the research on older adults in work and life transition for the past six years.

Jim Scheibel served as mayor of Saint Paul from 1990-1994. As senior vice president of the Corporation for National and Community Service under the Clinton administration, he directed both Volunteers in Service to America (VISTA) and Senior Corps, and he worked with Experience Corps. As a volunteer, he has long led efforts to get people involved in public service. He is currently Executive in Residence for the School of Business at Hamline University.

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Catherine Watson is a writer and photographer who was travel editor at the Minneapolis *Star Tribune* from 1978 to 2004 and is now travel editor for *MinnPost*. A pioneer in personal travel writing, she has published two award-winning collections of her work, *Home on the Road: Further Dispatches from the Ends of the Earth* and *Roads Less Traveled: Dispatches from the Ends of the Earth*. In addition to traveling, she teaches memoir writing and lectures internationally.