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Taking the “Taboo” Out of Retirement

Reimagining Later Academic Life



A collaboration between the Academic Advancement Network, the College of Education, and The WorkLife Office.

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Symposium Goals:

- Understand the **diverse forces calling into question traditional approaches** to late career and retirement
- Become familiar with **innovative initiatives at peer institutions** to support late-career and emeritus faculty and administrators
- Identify **actions MSU can take** to enhance its support for senior and retired faculty and administration colleagues

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Longevity and the New Aging: Transforming Retirement, the Academic Career and the 4th Quarter of Life

A Presentation to the Michigan State University Symposium on Late-Career and Emeriti Faculty

Fernando M. Torres- Gil, MSW Ph.D
Professor of Social Welfare and Public Policy
Center for Policy Research on Aging
University of California, Los Angeles
March 22, 2017


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A great pleasure to be with fellow Spartans
(Michigan State and San Jose State)
My Motivations for traveling to the Michigan

Kudos to your foresight in reimagining preparation
for retirement (the past), the retirement
experience (now) and the future for emeriti and
academic retirees (staff administrators, faculty)

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The Nation needs us! Lots to do! Dramatic
changes! We have a unique role!

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A Prologue

- It's a brave, new world –for those working and those retired. It's an even braver and newer world for those of us who are close to retirement or retired –whether faculty, staff, and administrators
- In addition to many challenges that pre-existed prior to November 2016, we now face an assault on science, rationality, facts, data, objectivity, and accumulated knowledge
- The **GRAND CHALLENGE**: Where do we fit in this brave and new world? Should we disengage and rely on our legacy and financial resources (pensions, defined contributions, savings, assets)? Are we irrelevant?

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My Message

We are needed more than ever. However, we may have felt about our pending or current retirement from academic, what we have built over a career and how we received satisfaction and worth, we must now come back to the table

BUT FIRST – SETTING THE STAGE

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My Purpose and Background

- To provide a context for the retirement challenges facing those of us who serve others in higher education AND to present the opportunities and a road map for the contributions we can make in our third and fourth quarter of retirement
- To examine a career trajectory relevant to our challenges and contributions: multiple roles, government and civic leadership, scholarship and research
- What does this mean for this conference
 - Contemporary developments that will reshape our notions of retirement and later life (e.g. POTUS 2016, ADEA/end of mandatory retirement, SS/Medicare/ADA)

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The Big Picture

- Demographic changes, Social and Political debates, Changing notions about the role of higher education

In sum: the world is "a-changing" and as we work with retirees and pre-retirees, we must be mindful about

- a) Longevity and increased life span for most (but not all)
- b) We --as faculty, staff and administrators-- are viewed as a "privileged group" (but not all)
- c) The Public (e.g. electorate, taxpayers, politicians, pundits) is questioning the value and our role in Higher Education
- d) Diversity and the aging of Baby boomers are key trends reshaping the public narrative
- e) Society at large is struggling with redefining retirement, leisure, retirement insecurity, growing old, concerns about caregiving, Alzheimers, etc.

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Professor FTG's Personal Motivations and Experiences

- The path to a role of a scholar/policy entrepreneur
- The Gift and opportunities of an academic career
- The nervousness about my pending retirement
- Practicing what I've always preached
- Preparations to give back: to relearn (A Masters in History), to recharge intellectually (Stanford), to stay healthy and mobile (for a balanced lifestyle of family and fun), and to reengage in the great struggles (for the next generation, for reframing the public narrative, for using my longevity to engage in policy advocacy)
- Rebalancing my self-identity--What am I if not in a profession? → family and social life combined with my career strengths

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And what might this mean for you personally?

1. Growing pressures to alter the public benefit we depend on in retirement: Social Security, Medicare (part D), Medicaid
2. The continuing unsustainability of many public pension plans (unfunded liability)
3. The hope that TIAA-CREF remains stable (competition from Fidelity and other financial service firms)
4. The Vagaries of the stock market (will it always remain at 20,000 plus?)
5. The UPSHOT: Many uncertainties...we can't be complacent

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The Policy Challenges

- Retirement as we know it is **changing** --we may be the last to enjoy legacy of last century
- We enjoy DB and DC yet we struggle with meaning and encore roles
- Higher Education (public and private) struggles to sort out what to do with us:
 - e.g. can we still contribute, should we move on, how do we transition out, can they afford us
- Public institutions face fiscal pressures and public resistance
- Private institutions face competition, market volatility
- Families and students face high debts, disillusionment, and employment insecurity

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Back to Why Trump Won – Lessons for Us All

- Much of Academia operated in a bubble – criticisms of our "progressive/liberal" values had merit. We have become, in some respects, too "PC"
- What transpired to elect Trump, was in part, a segment of the American people that truly felt invisible and forgotten
 - Another key part – Rapid demographic change to diversity, minorities, immigration, refugees – has always unsettled previous generations
 - Changes in the economy – globalization, outsourcing, financial elites
 - The travesty of social and economic disparities not seen since the 1920s
 - The narrowness of the newly empower ethnic and liberal elite

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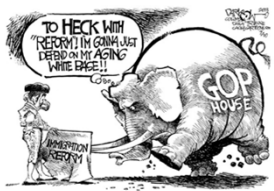
- **The urgency of Reframing the Public Narrative**
 1. The stake the nation has in understanding and accepting demographic changes
 2. Revising the social contract to a multi-generational and multi-ethnic direction
 3. Bringing home those forgotten and invisible
 4. The Irony: We will retire with visions of the last century and find we have expanded longevity, and must live as a retiree during this great upheaval!

- FTG Epiphany – a visit to the heartland: Indiana and Ohio
 - This too shall pass – WE have X years to reframe, redefine, and recalibrate – as pending and future retirees, we have a role to bring back factual realities and the value of knowledge

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The Trump "Presidential" Administration


- We will be in our "retirement" while government deals with entitlement reforms, budgetary pressures, and shifting role of government
- The role of older persons in voting and politics
- Older voters still primarily White, English speaking, and vote more than young and diverse groups



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The Politics of Aging- Why it Matters

- A bifurcated electorate: older white conservatives “heavily Trump” and younger diverse populations “Gen X and Millennials” immigrants, and ethnic groups
- The nexus of both impinges on who we teach, who influences current budgets and policies, and our constituents and old age



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2015 White House Conference on Aging –The Last Progressive Opportunity?



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Challenges and Opportunities

- The challenge to find meaningful roles, innovative models, administrative incentives, and pre and post retirement best practices
- Seeking avenues for transitions (e.g., step down, phasing, new forms of tenure, and sabbaticals)
- The need to maintain pension and retirement security while addressing the psychosocial needs of retirees
- The tension between older faculty and younger/diverse faculty and staff: opening the pipeline while creating options to continue and/or give back
- What to do with ourselves in this next quarter of life
- Do we disengage (all leisure- all the time?) or reconfigure our roles
- How do we become relevant to Gen X and Millennials who will face the consequences of today

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Preparing for Retirement: The Professional, Personal, and Emotional Transition

- Coming close to the end (of formal academic life) is more than just: how much do I have to live on and what type of fun in retirement?
- Requires a multi-faceted intellectual, strategic, tactical and astute assessment of...



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1. The obvious – retirement income, benefits, university relationships, maintaining connects
2. The less obvious – Can I handle it psychologically, what impact on the home and family life
3. The emotion: What is my worth and values –how will I cope with a "loss" of role?
4. The Process of recalibrating: plan way ahead, know there is a psychological adjustment, reassess social and interpersonal skills, reevaluate family and friendship relations, know your health (physical and mental)
5. Moving forward to a new purpose in life –YOU ARE NEEDED MORE THAN EVER – we have unique skills, insights, experiences, and reputation
6. Select at least "one giving back" project and begin that several years before retirement and dive into post-retirement

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Key Conceptual Frameworks and Questions

1. The Life Span perspective and the Four Quarters of Life

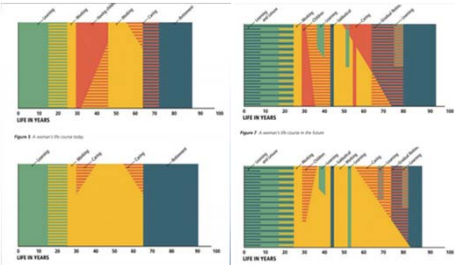


Figure 1: A conceptual life span model. Figure 2: A conceptual life span model. Figure 3: A conceptual life span model. Figure 4: A conceptual life span model.


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2. Cohort Analysis and the Aging of Baby Boomers

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Key Conceptual Frameworks and Questions (Continued)

1. Life span perspective
2. Cohort analysis
3. A Majority- Minority Society
 - Shifting Notions of a Social Contract
 - A new retirement environment
 - Deconstructing retirement (An obsolete term)
 - Reimagining the last two quarters of life




A large double-headed arrow is at the bottom.

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A Personal Longevity Plan

- Assume you live to be 100 years of age: how do you plan for:
 - a. Financial security
 - b. Social Supports
 - c. Vicissitudes of aging (e.g., chronic conditions)
 - d. Aging in place and livable communities (e.g., long term care)





"Winning is crucial to my retirement plans."

A large double-headed arrow is at the bottom.

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Our Ultimate Goal


- To reassess and redefine the role of faculty, staff, and administrators in such a way that we show value to the public, society, and governance. To seek out flexibility, opportunity, and options to:
 - a. Enjoy longevity in Higher Education
 - b. Resocialize pre-retirees at a young point in their careers about the above
 - c. Plan for post-retirement that continues our contributions to society and its many challenges
 - d. Becomes a feedback loop where entering faculty, staff, and administrators begin retirement planning at the beginning

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Key Questions

1. What relevance does this big picture and broad context have to transforming retirement
2. How might this presentation inform the larger university conversation about reimagining later academic life?
3. Where does our self-interest end and where does altruism begin?
4. Is there room in our immediate concerns for incorporating broader contributions to society (e.g., advocacy for students, minorities, young faculty and staff, promotions for diverse groups)
5. Should we incorporate a "Personal Longevity Plan" in our pre-retirement initiatives?
6. How do we transition through the "Trump years" and the changing public narrative about academics and the role of higher education?
7. Once again, how do we relate to younger cohorts and maintain respect?

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Longevity and the New Aging: Transforming Retirement, the Academic Career and the 4th Quarter of Life
 PowerPoint Prepared by:
 Jackie Tran
 UCLA, Class of 2017
 Gender Studies Major

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Connecting to Michigan State University

Elizabeth H. Simmons, Dean, Lyman Briggs College and Associate Provost for Faculty and Academic Staff Development, Academic Advancement Network

Theodore H. Curry II, Associate Provost and Associate Vice President for Academic Human Resources

Bill Donohue, Faculty Grievance Official and Professor, Communication

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Questions?

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Colleges and Universities as Models, Facilitators and Champions of Transformed Retirement

Carole Goldberg
Vice Chancellor Academic Personnel, Emerita
Jonathan D. Varat Distinguished Professor of Law
UCLA

Michigan State University – March 22, 2017

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- Reduced State Funding/ Tuition Pressures
- Growing Undergraduate Student Enrollments
- Limited Opportunities in Academia for Ph.D.s
- Need to Improve Diversity of Professoriate, Staff
- Growing Regulatory/Compliance Demands
- NEED TO DO MORE WITH LESS!

CHALLENGES FOR HIGHER ED

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- Large Cohort of Baby Boomers
- Improved Health & Longevity
- Tenure
- No Mandatory Retirement
- Ph.D. group more diverse than current professors
- At UCLA
 - Generous Defined Benefit Retirement Plan
 - 250+ Senate Faculty (nearly 15%) with >35 Years of Service

GIVENS

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BY RETHINKING FACULTY/STAFF RETIREMENT, WE CAN –

- Open positions to an increasingly diverse cohort of university graduates AND STILL
- Retain prized talents, contributions, institutional knowledge of longtime employees who remain engaged


REALIZATION –
A MAGICAL RESOURCE

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A Virtual Eleventh Campus

An Inventory of University of California Emeriti Activity During 2012-2015

CUCEA
Council of University of California Emeriti Associations



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- Financial concerns
- Psychological concerns/loss of identity
- Loss of resources to continue work
- Diminished commitment to sub disciplines

ACKNOWLEDGING REASONS FOR RELUCTANCE TO RETIRE

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- Retirement isn't a **severance** of the relationship
- It's a **RECONFIGURATION** of the relationship

NEEDED: A RADICAL RECONCEPTION


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- OLD ROLE
 - Financial counseling
 - Post-retirement programming
- NEW ROLE = OLD ROLE +
 - Educating faculty/staff about potential value of retirement
 - Providing real incentives for retirement, before and after
 - Providing greater recognition for value/contributions of emeriti and retirees
 - Creating real opportunities for faculty/staff to find fulfillment through contributions to the university

NEEDED: NEW VISION OF UNIVERSITY'S ROLE

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Professor Emeritus David Lopez named inaugural UCLA Faculty Retirement Liaison



David Lopez, Professor Emeritus of Sociology and the inaugural UCLA Faculty Retirement Liaison, was appointed in April 2016 by Vice Chancellor for Academic Personnel Career Building, Professor Lopez advised and advised for faculty retirement and continuing involvement as well as for those who have already retired. He has faculty members plan the structure and negotiate pay and post-retirement arrangements with their departments, including Professor's Retirement and other agreements, retention of space and access to the Research Professor working for his emeriti emeriti, he also helps ensure faculty understand and navigate the university's general retirement process and system. Faculty inquiries, he advocates for continued and expanded emeriti faculty involvement in teaching, research and service across campus, as well as assisting individual emeriti faculty in finding meaning in their departments and careers.

In announcing this innovative appointment, Vice Chancellor Gendron noted that "Professor Lopez' new position supports an important campus initiative to assist faculty in making continuing contributions to UCLA's research, teaching, and service mission post-retirement. Emeriti faculty can continue to be central contributors to the vital research and study" that the Age-eligible plan career at UCLA, from Assistant Professor to Professor Emeritus, David Lopez has served in numerous administrative and service positions, including Associate Dean of Graduate Studies, Chair of Latin American Studies, Sociology Department Chair and as Chair of the Senate Council on Planning and Budget, the Emeriti Affairs Committee, and the Committee on Faculty Welfare.

David Lopez is available to Academic Senate faculty year-round through the contact by email at DLopez@ucla.edu and by phone at 310-205-1988.

STRATEGIES - EDUCATION

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The Path Forward:
Workshops on planning for retirement and maintaining active professional engagement in emeriti status

Workshop I: Navigating the Dual Retirement Processes
Faculty Retirement Liaison discusses how to ensure successful transition to emeriti years; craft & negotiate with your chair the understanding under which you will retire

Workshop II: Continuing Professional Involvement after Retirement
Faculty from different disciplines share experiences, answer questions about continuing research, scholarly involvement, teaching & service into their emeriti years

Workshop III: Mechanics of the UC Retirement Process
Retirement counselors explain how to maximize benefits.

STRATEGIES – EDUCATION

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- Pre-retirement: Pathways Agreements
 - Allows University, faculty member to plan
 - Provides transition-related benefits, pre- and post-
- Post-retirement
 - Research Professor working title
 - Office space policy
 - Endowed chair policy
 - Discounts (parking, Faculty Center, etc.)

STRATEGIES -- INCENTIVES

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- Events: Reception at the Chancellor's House
- Displays: Emeriti art in the Vice Chancellor's Office
- Awards: For scholarship, teaching, service post-retirement

STRATEGIES - RECOGNITION

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- Recall for teaching, research, service
- Emericorp Mentoring Program for Associate Professors
- Inclusion in Senate, administrative leadership roles
- Work with programs such as Encore.org

STRATEGIES – FULFILLING opportunities to contribute

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- Extend initiatives to staff as well as faculty
- Address university's relationship to retired faculty/staff who volunteer
 - Compliance obligations
 - Liability issues
- Extend services earlier in pre-retirement phase
- Expand post-retirement services connecting campus (and community) to retirees
- Greater recognition for the value provided by retirees

Challenges ahead



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Questions?



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*New Visions of Later Academic Life:
Innovative Initiatives at Colleges and
Universities*

Presented by Roger Baldwin
*Erickson Distinguished Chair of Higher, Adult, and Lifelong
Education, Department of Educational Administration, College of
Education*



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New Visions of Later Academic Life

Innovative Initiatives at Universities and Colleges

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Innovative Late-Career Initiatives

With thanks to ACE Faculty Retirement Transitions project

Pre-Retirement Years	Retirement Transition	Post-Retirement
One-stop comprehensive retirement website	Transparent retirement policies	Retiree-friendly culture (Welcoming continuing involvement & contributions)
Retirement communications and conversation	Varied pathways into retirement (e.g., UCLA Pathways Policy)	Retiree benefits (e.g., email access, library privileges, course enrollment, parking, research space, PI eligibility, governance role)
Pre-retirement counseling and life planning	Opportunities to complete legacy projects	Retiree organizations
Support for legacy projects <ul style="list-style-type: none"> • Teaching • Research • Creative projects 	Recognition/Celebration of career contributions and achievements	Part-time teaching opportunities
Resources to complete projects: Grants, time, etc.		Encore career opportunities (e.g., consulting, interim appointments, project work, mentoring)
		Competitive grant support for continuing scholarship
		Living history projects

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Support and Opportunities During Late-Career/Pre-Retirement Years

- **Awareness Campaigns:** Bringing retirement out of the closet
 - Widespread publicity of retirement policies & practices, newsletters including retirement information
 - **Cornell:** "Pathways to Your Encore" open to Baby Boomers & Gen X employees
- **One-stop retirement website:**
 - **San Jose State University:** Including resources, retirement models, calculator to assess financial implications of retirement options
- **Career & Retirement Planning:**
 - **George Mason University:**
 - "Your Next Chapter: Charting a course for Retirement" program.
- **Legacy Projects**
 - **Carleton College:** Opportunity to teach a special course or complete a project.
 - **Mount Holyoke College:** One-time grants to complete a project.
 - **Wellesley College:** Career Capstone Event (e.g., conference/symposium on person's specialty area)

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Retirement Transition Support

- **Transparent Retirement policies**
 - **Princeton:** Four retirement – transition packages: Alleviates concern about inequitable retirement arrangements
 - **UCLA:** Retirement Pathways; Retirement Advisor/Coach
- **Phased Retirement options**
 - **University of Iowa:** Up to five years reduced load with benefits
 - **University of Texas:** Up to three years with 50% or 25% assignment, requires plan developed with chair
- **Peer Models**
 - **San Jose State:** Videos of successful transitions; alternative approaches to retirement

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Post-Retirement Opportunities and Support

- **Opportunities for continuing employment or volunteer service**
 - **Georgia Tech:** Part-time employment opportunities for retirees on teaching, research, or service tracks
 - **USC:** Encore Program leverages unique skills of retirees through part-time and volunteer service opportunities on campus
 - **Univ. of Washington:** Employment up to 40% post-retirement for five years
- **Support for continuing scholarship**
 - **University of Minnesota;** **Ohio State:** Competitive grants for research or professional development
 - **University of Baltimore:** Clerical support
- **Ideal is a retiree-friendly culture**
 - **Cornell:** Opportunities to take courses, remain research active, participate in governance, access to athletic and social facilities, serve university

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Higher Education Retirement Organizations

- Maintain connections to colleagues and institution
- Offer opportunities for learning and intellectual engagement
- Support scholarship
- Provide channels for continuing service : Teaching, mentoring, consulting, work with alumni/development, etc.





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Different Retirement Organization Models:

- **Retiree association:** MSU
 - Includes faculty & staff/administrators
- **Emeritus College:** Arizona State, Emory
 - Learning, scholarship, creativity focus
- **Emeritus Academy:** Ohio State University
 - Sustaining research productivity in retirement
- **Retirement Center:** UC-Davis, UCLA
 - Umbrella unit coordinating university relations with retirees, retiree associations, other forms of support

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Re-imagining Later Academic Life


- Need to rethink our models of late-career and retirement
 - Assuming late-career is just like earlier career stages ignores realities of academic life
 - Severing ties at retirement wastes valuable talent






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Re-imagining Later Academic Life

- Metaphor for late academic life should be a **dimmer switch**, not an **ON** or **OFF** switch
- Retirement is a process, not a binary choice






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“Win-Win” for Individuals and Institutions

These visions of later academic life are the “**Tip of the Iceberg**”: Many ways to support and engage Late-Career Academics

- **MSU** must identify its own path
 - Many initiatives we can learn from and adapt to our situation
- Engaging our senior academics more strategically will benefit them
 - It will also benefit and enrich the **MSU** community



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“When you make sure your emeriti are treated well, you reinforce a culture where people naturally make the decision to retire, because they’re not giving up what made them a successful member of the community for so long.”

Steven Poskanzer, Carleton College

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Break for Lunch

(12:00 – 1:00 p.m.)

Don’t forget to sign up for a working group at the registration table prior to heading to lunch!

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Creating Personal Pathways through Late Career: Four Working Groups

- Group Task:
 - Select a Reporter
 - Discuss each question on worksheet
- Your Group's Deliverable:
 - Three ideas or actions your group recommends MSU should consider
 - Reporter will share recommendations with symposium

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Group Focus:

- Group 1: Innovative Strategies for Engaging and Supporting **Senior Faculty and Administrators**
- Group 2: Innovative Strategies for Engaging and Supporting **Retired Faculty and Administrators**
- Group 3: Reimagining Later Academic Life: What are the **Institutional Issues?**
- Group 4: Innovative Strategies for **Administrative Leaders to Engage and Support Senior and Retired Faculty and Administrators**

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*Reporting Back - Personal Pathways:
Working Groups for Individual Paths at
Michigan State University*

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Group 1
Innovative Strategies for Engaging and Supporting Senior Faculty and Administrators

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Group 2
Innovative Strategies for Engaging and Supporting Retired Faculty and Administrators

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Group 3
Reimagining Later Academic Life: What are the Institutional Issues?

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Group 4
Innovative Strategies for Administrative Leaders (Deans, Department Chairs, etc.) to Engage and Support Senior and Retired Faculty and Administrators

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“Moving Forward” Panel of Deans, Chairs and Academic Administrators

Theodore H. Curry II, Associate Provost and Associate Vice President for Academic Human Resources

Suzanne Lang, Associate Dean, Faculty Affairs & Administration for the College of Agriculture and Natural Resources

Christopher Long, Dean, College of Arts and Letters

Juli Wade, Professor and Chairperson, Psychology and Assistant Provost for Faculty Development – Leadership Development, Academic Advancement Network

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Thank you!

- Setting Next Steps with Self Addressed Envelopes
- Online Program Evaluation Survey
- Please contact me with any questions:

Roger Baldwin
Erickson Distinguished Chair of Higher, Adult, and Lifelong Education, Department of Educational Administration, College of Education
 Email: rbaldwin@msu.edu
 Phone: 517-355-6452
