

DATE: March 20, 2018
TO: AAA Board of Directors
FROM: AAA Committee on Continuing Engagement (CCE)
RE: Committee Report (Final)

The Committee on Continuing Engagement was formed by early Fall 2017. Below is the committee report including the following items:

1. Charge to the Committee based on the AAA website;
2. Information gathered from organizations and generated by the committee;
3. Consideration of the AAA membership value proposition for retirees (outcomes and recommendations);
4. Procedures used to gather data:
 - Organizational Phone Conversation- see Attachment A
 - Construction of Time line-see Attachment B
 - List of Organizations to be reviewed – see Attachment C
 - Sample questions – see Attachment D

Item 1: Charge to the Committee

“The objective of the task force on Continuing Engagement is to explore ways the AAA could create opportunities for retired members and members nearing retirement to stay engaged with the accounting academy. Members should consider a wide range of ideas related to research, education, practice, and public interest. These ideas could fit within the broad organization, any of the Centers for Advancing Accounting, global accounting organizations, AAA Sections, AAA Regions, or any other context. Collectively the activities should be self-sustaining or create additional revenues for the AAA. A set of recommendations should be made to the AAA Board by April 1 2018 so that they could be incorporated into the AAA Strategic Planning Process which will occur in late May 2018.”

Item 2: Information Gathered

Multiple sources of information informed our thinking on the issues.

We undertook reviews of other Organizations and Societies to learn from those that are welcoming to retired members. Each member of the committee was asked to contribute five or more names of organizations or societies (full list is in Appendix C). Then the committee divided the list among ourselves and each member looked at the organizational web sites to identify any dues alteration or programing, etc. specifically targeted to retired members. These reviews (and some phone calls) made it evident the limited progress made by these other organizations in providing attractive options for retirees to remain members (particularly academic societies/organizations – see Appendix D for an example). While several organizations have reduced dues, we found limited evidence of other programmatic offerings designed to attract and retain retired members. Exceptions tended to be professional unions... some examples are below:

- Communications Workers of America (union): offers a lifetime membership option; has a Retired Members Council – among its duties is monitoring federal, state and local politicians and legislation in support of CWA goals.
- National Education Association (union): has an annual meeting just for retired members (latest was June 27-28, 2017 in Boston), offers volunteer and mentoring opportunities, has a retiree magazine; reduced dues (retired: \$30 + state dues – retirees get all member benefits); active members are often paid through organization memberships (e.g., school pays dues to cover X educators) or there is an individual option.
- Senior Executives Association (professional association for high level civil servants): significantly reduced dues option for life time members.

Item 3: Outcomes and Recommendations

The committee brainstormed on the value proposition for retirees and near retirees (part-timers) to engage with the AAA and its sections and regions. Below is a list generated by committee members of AAA actions that would provide actual and potential value added for retirees. This list is based on the proposition that Schools of Business and Universities do not pay either the dues, program fees, or travel expenses for retired members to join or attend AAA activities.

- Establish a home for AAA retirees by creating a Retired Accounting Faculty Group (RAFG or GRAF—Group of Retired Accounting Faculty). This organization could/would have some of the characteristics of sections and regions, but differ in focus (not functionally focused) and breadth (no regional focus).
 1. The group would provide a ‘home’ for retired faculty by providing speakers related to retiree activities and interests. Retirees would run and organize the “group”.
 2. For an example of a faculty/staff retiree group see <http://retirees.msu.edu/>
 3. The RAFG could provide a clearing house for mentors to new faculty, placement services for retirees, a speakers’ bureau, etc. (see some of the suggestions below).
- Encourage participation in the annual (section and/or regional) meeting by providing opportunities to:
 1. Be on the program and review papers for inclusion in the meetings.
 2. Meet with colleagues and friends.
 3. Serve on committees, meet with publishers.
 4. Attend various receptions (beyond the meeting sponsored receptions...university, journal publisher, firm, etc.).
 5. Where appropriate, invitations to participate in meetings, reviewing papers for meetings and volunteering to chair sessions or comment on papers should include a specific reference to retired members.
 6. After brainstorming, the committee created the following ideas as additional value added activities for retirees that AAA (and sections and regions) could create to improve the value proposition:
 - Create a placement service for retirees looking for part-time engagement (e.g. teaching online).
 - Create a one, two, or multi day annual meeting package for retirees with a reduced cost.
 - Consider breaking the annual meeting costs into specific categories and allow retirees to register for what they can afford...e.g., they could choose to attend a lunch or reception but not the rest of the meeting.
 - Provide free electronic access to journals (not sure how effective this will be, but should not be costly for the association).
 - Create opportunities for retired members to mentor young members (particularly untenured faculty), through some type of matching process: this program might be entitled “The AAA Retired Faculty Mentors Program”.
 - Create opportunity for retired members to mentor other members that are about to retire.
 - Create an opportunity for retirees interested in providing authors with working paper reviews or reviews for editors of the various journals.

- Maintain the honorary Lifetime Membership category of after 40 years of membership-but make it free (this is separate from a retired membership category...see next bullet point).
- Create a Retired Member category for dues. This would be based on an “official retirement” from their full time employment (either university or professional) and an age based cut-off plus a “working no more than XX hours per week” pledge. The dues would be much reduced for non-working (\$40??) and somewhat higher for those working part-time. Lifetime members could/would receive the same benefits as retired members.
- Sections and Regions should reduce meeting costs and dues in a similar fashion to retain retiree participation and membership.

Item 4: Procedures Used to Gather Data

Attachment A: Initial Committee Organizational Phone Call

Dear Committee Members;

First, thank you all for your willingness to participate in the AAA Continuing Engagement Task Force.

Second, I apologize for the slow startup of the committee. I have been traveling out of the country and only recently returned (you know how retirees are!).

I sent the list of questions below to Anne Christensen during our communications about the task force. My question and her responses are shown below:

1. Are funds available to gather information from retirees on the AAA activities/opportunities that might best serve them (i.e. fund a questionnaire or phone calls)
2. Does the AAA have a database of contact information of AAA retired members and previous members?
3. Are there other academic organizations that have had some success engaging and retaining retirees?
4. Is this task force the initial AAA group to investigate this issue? (are there minutes or notes of previous discussions?).

Anne's responses are below:

You have posed a good list of questions and I will try to answer each one below.

There would be AAA funds to gather information from retirees. The AAA can facilitate long distance calls or conference calls. SurveyMonkey and Qualtrics have free versions available for simple surveys and I have access to a more complete version of Qualtrics through my university. The AAA also has online survey tools and we would be happy to help.

The AAA has some information on retirees, but Tracey thinks the database may be incomplete.

Some individuals have been asked to serve on the taskforce and I can send you the list as soon as the AAA staff is back in the office following the annual meeting. We tried to think of people from a range of disciplines and I've included some international people. You would be welcome to decide how big the taskforce should be and choose the remaining members.

We have not done any research to find out if other academic organizations have developed ways for their retired members to stay engaged. Tracey is planning to check with the operations manager for the Academy of Management.

This is not a standing committee of the AAA and represents a new initiative for the AAA. Investigating how other organizations are keeping retired members engaged as well as your

other questions would be good to add to the taskforce charge. As this is a new initiative any suggestions you have for the taskforce would be most welcome.

Surveying other organizations' policies and procedures for ideas:

Many other academic organizations are dealing with the same issues. I believe we should first attempt to learn from other similar organizations about what works and what will not work.

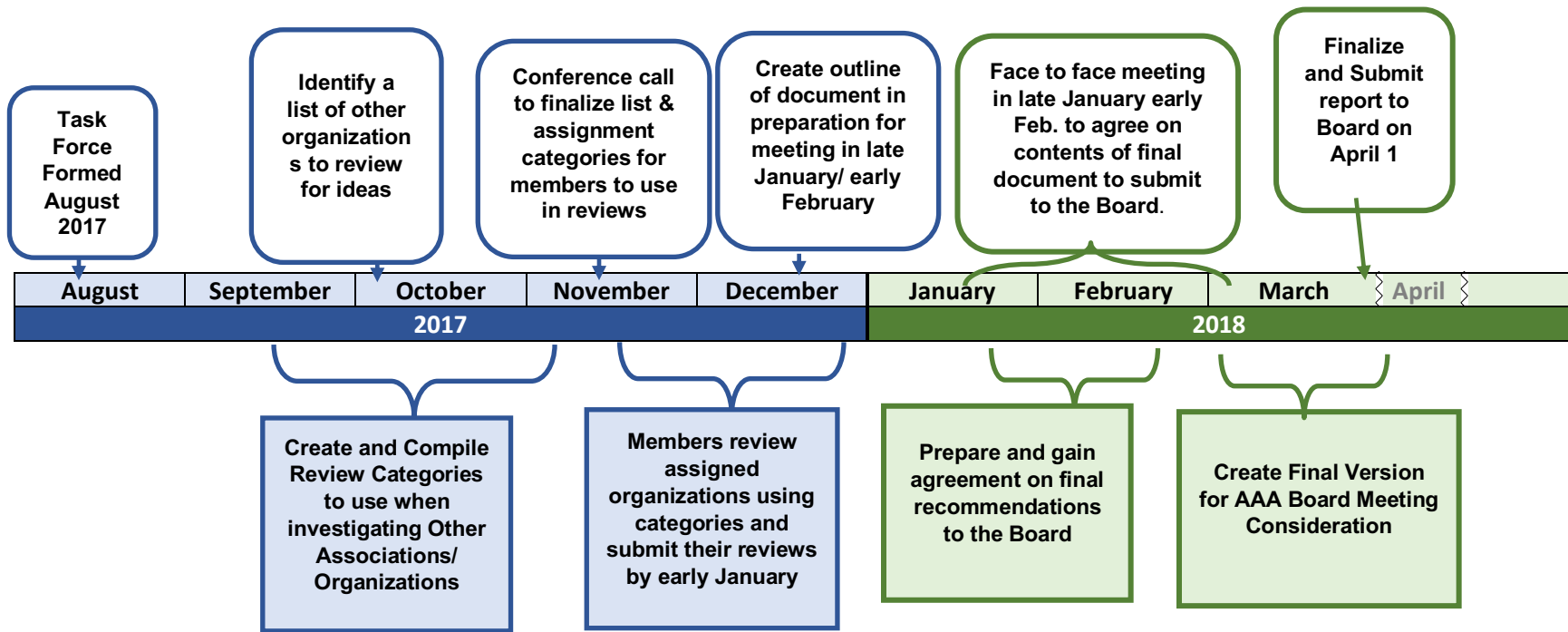
For example the American Library Association has a relatively large program for retirees. ALA is much larger and more diverse than AAA (containing both academic libraries and public libraries). Nonetheless using their experiences to inform our proposals seems worthwhile.

So my first proposal is for the committee to generate a list of organizations that have opportunities/programs/structures/ etc. for retirees to engage with the organization. This could be as minimal as the AAA's reduced dues if you've been a member for over 40 years (I've just qualified!!) to more extensive committees, communities, and opportunities.

Initial Draft of Time Line:

1. Generate lists of organizations and create questions and outreach effort to gather more data
2. Use AAA data to find a list of members for a phone survey to representative retiree faculty (close to retirement and already retired) about what keeps them engaged or might keep them engaged.
3. Make member phone calls in October/November time frame.
4. Gather names of organizations and related information (complete by October 30).
5. Survey selected organizations via phone calls in November.
6. Committee meeting in late January early February to come to a consensus about remaining work and outline of final report.
7. Work on report in late February early March to get final consensus.
8. Submit final report to AAA Board of directors by April 1, 2018.

Attachment B:
Continuing Engagement Task Force
Tentative Milestones and Time Line to Complete Task Force Recommendations



Continuing Engagement Task Force Work



Attachment C: Organizations to investigate List

Website Address	Committee Member Name	Reviewer
www.tactyc.org	Tracie Miller	Tracie Miller
www.nbea.org	Tracie Miller	Tracie Miller
www.aaace.org	Tracie Miller	Tracie Miller
www.ahrd.org	Tracie Miller	Tracie Miller
www.sdlglobal.com	Tracie Miller	Tracie Miller
www.aacsb.edu	Tracie Miller	Tracie Miller
www.tccta.org	Tracie Miller	Tracie Miller
www.aera.net	Tracie Miller	Tracie Miller
www.amte.net	Tracie Miller	Tracie Miller
www.maa.org	Tracie Miller	Tracie Miller
www.cpcusociety.org	Karen Pincus	KarenPincus
www.cwa-union.org	Karen Pincus	KarenPincus
www.nea.org	Karen Pincus	KarenPincus
seniorexecs.org	Karen Pincus	KarenPincus
www.acm.org	Karen Pincus	KarenPincus
www.cfachicago.org	Karen Pincus	KarenPincus
www.onefpa.org	Karen Pincus	KarenPincus
www.atpe.org	Karen Pincus	KarenPincus
www.adea.org	Karen Pincus	KarenPincus
www.aicpa.org	Karen Pincus	KarenPincus
www.cpaaustralia.com.au/	Stewart Leech	StewartLeech
www.charteredaccountantsanz.com/	Stewart Leech	StewartLeech
www.afaanz.org/	Stewart Leech	StewartLeech
www.arita.com.au/	Stewart Leech	StewartLeech
www.iaa.org.au/	Stewart Leech	StewartLeech
www.fpaaustralia.com.au/	Stewart Leech	StewartLeech

www.publicaccountants.org.au/
www.imanet.org
www.icaew.com/
www.accaglobal.com/
www.aea.org
www.ala.org
www.afajof.org
www.historians.org
www.aom.org
www.aoss.org
www.apsanet.org
www.aag.org
www.acs.org
www.amstat.org
www.nursingworld.org
www.aanp.org
www.aacn.org
www.agacgfm.org
www.agiaph.org
www.ast.org
www.apbahome.net
www.theiia.org
www.njcpa.org
www.picpa.org
www.apa.org
calcpa.org

Stewart Leech
Stewart Leech
Stewart Leech
Stewart Leech
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Don Wygal
Bill Felix
Bill Felix

Stewart Leech
Dick Larsen
Dick Larsen
Dick Larsen
Jan Williams
Sue Haka
Jan Williams
Jan Williams
Sue Haka
Jan Williams
Jan Williams
Sue Haka
Sue Haka
Sue Haka
Sue Haka
Don Wygal
Bill Felix
Don Wygal
Bill Felix
Don Wygal
Bill Felix
Don Wygal
Bill Felix
Don Wygal
Don Wygal
Bill Felix
Bill Felix
Bill Felix

