

# The Extension

## President's Message: Barbara Bullock

These are certainly turbulent times for just about everything I care about, but my focus here will be on the future of higher education. Because I am cursed with always seeing the sunny side of things, I'll start with the good news.



Spring is here. Trees are budding, birds are chirping, coats are going by the wayside, and days are longer. As much as I love winter, there is always that feeling of relief when spring comes along—we made it through another one!

And so did the university. Enrollment for spring semester was up over last spring, according to the Office of Institutional Research and Effectiveness:

- College Credit Plus: 1,138 (3.93% increase)
- Undergraduate: 7,002 (7.61% increase)
- Graduate/professional: 3,047 (2.52% increase)
- Total: 11,187 (5.80% increase)

More good news: Wright State University was ranked as the top public university in Ohio for social mobility in the *Wall Street Journal's* 2025 America's Best Colleges rankings. The social mobility ranking, which acknowledges how much a university enhances students' social mobility after graduation, considers the number of years it takes students to pay off the net tuition price, how much a university boosts its graduates' salaries, the proportion of students at the university who receive Pell Grants and the graduation rates of those students. More than 40% of first-time undergraduate students at Wright State for the fall 2024 semester were Pell Grant recipients.

So that's good news, right? Students get a great education while increasing their social mobility. However, Pell Grants (a type of federal aid available to low income families who demonstrate financial need on the FAFSA) could be impacted next year due to the downsizing of the U.S. Department of Education and a project budget shortfall. The budget shortfall is caused by an increase in student population and an increase in applicants in need. There are many paths to success, but if a student chooses higher education without the means to access it, shouldn't they be supported?

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### Upcoming Events

**Monday, April 14, 7 pm**

**Book Talk and Signing**

*Katharine, the Wright Sister*

Tracey Enerson Wood

Student Union Apollo Room

**Thursday, May 8, 11 am**

**Annual Retirees Luncheon**

EJ Nutter Center

(See details, page 8)

**Sunday, September 14, 1:30 pm**

**Retirees Picnic**

Rotary Park, Beavercreek

WSURA sponsored activities are announced by email, so make sure that we have yours on file!



Continued from Page 1

Other news items of concern include:

- Federal and state efforts to ban diversity, equity and inclusion initiatives on campuses;
- The Trump administration's move to cap indirect cost allotments that come with National Institutes of Health research funding;
- The establishment of intellectual diversity centers and related efforts to eliminate perceived liberal bias at Ohio's public universities; and
- Efforts to control student protests and rein in freedom of speech on college campuses, including in the classroom.

The rules by which we lived and worked at Wright State University (and all public institutions) are changing. How should we respond? If you have ideas about how to address these issues, let us know. If you send your thoughts to us at [wsura@wright.edu](mailto:wsura@wright.edu), we will compile them and publish them on the WSU Retirees Association website and/or in the next *Extension* newsletter.

## Robert Rubin Interview Excerpts

Senior Lecturer; President, AAUP-WSU; Director of ESL;  
Director, Ambassador Program to Costa Rica;  
School of Humanities and Cultural Studies



*As retirees we often lose touch with the day-to-day flow of the university, so the WSURA Board decided to ask Robert "Bobby" Rubin a few questions about the way things are these days at 3640 Colonel Glenn Highway and about the direction in which WSU and higher education are headed. We asked Bobby because, as is obvious from the many titles following his name, he has done just about everything, and also because he will retire at the end of this semester. by David Garrison*

Enrollment is up this semester. Do you think it will ever get back to what it was at its peak in the early 2000s?

**"I just don't see that happening. The demographic reality is that there are fewer young people, that is people who will be graduating high school in the coming years, than there were back in the 2000s. Enrollment is largely up because of a huge surge in international students from India, China, and Nepal, primarily."**

What kind of positive things do you see in the new configurations of the university, in which many departments have been joined together?

**"It probably made sense, in the long run, to merge these departments. Some programs and departments were simply too small and risked being eliminated. Merging them into larger schools helped save faculty jobs and some majors. I do also see the possibility for new collaborations, team teaching, and cross-listed courses. I find those possibilities to be intriguing, and I hope they come to fruition. The (relatively new) dean of the College of Liberal Arts seems especially open to creating new courses and programs, and exploring new connections."**

Do you feel that Wright State's mission has changed? We started out as a state school trying to meet a wide range of educational needs in our region. Does it seem that we are moving toward being more of a vocational program?

**"It has changed, indeed. Upper-level administrators at Wright State have publicly downplayed the importance of research, and support for research has waned considerably over the past decade. Faculty are being asked to focus more on moving large numbers of students through their classes, but lost in the conversation are the standards and rigor that we require of our students."**

NOTE: The full interview can be found at <https://www.wright.edu/retirees-association/our-stories/Rubin>

## Poetry Corner

### They Sit Together on the Porch

by Wendell Berry, from *A Timbered Choir*

They sit together on the porch, the dark  
Almost fallen, the house behind them dark.  
Their supper done with, they have washed and  
dried  
The dishes—only two plates now, two glasses,  
Two knives, two forks, two spoons—small work  
for two.  
She sits with her hands folded in her lap,  
At rest. He smokes his pipe. They do not speak,  
And when they speak at last it is to say  
What each one knows the other knows. They have  
One mind between them, now, that finally  
For all its knowing will not exactly know  
Which one goes first through the dark doorway,  
bidding  
Goodnight, and which sits on a while alone.



David Lee Garrison

Wendell Berry, 90, lives in Port Royal, Kentucky. He has won many awards, including the Richard C. Holbrooke Distinguished Achievement Award of the Dayton Literary Peace Prize.

A farmer, his work often reflects agrarian values, and he has long been an ecological activist. This poem begins with the simple scene of a husband and wife sitting together on the porch after dinner. It leads to a moving reminder of death.

## Is There a Windfall in Your Future?

If you are eligible to receive Social Security benefits in addition to an Ohio state public pension, the Social Security Administration (SSA) has some good news for you. In late February, SSA announced that it is beginning to pay retroactive benefits and will increase monthly benefit payments to people whose Social Security benefits have been affected by the Windfall Elimination Provision (WEP) and/or the Government Pension Offset (GPO).



On Jan. 5, President Joe Biden signed into law the Social Security Fairness Act, which overturned the two provisions that reduced Social Security benefits for some people who receive pension income from public-sector work where Social Security payroll taxes were not withheld. The Congressional Research Service estimates more than 230,000 Ohioans are in that group.

The Congressional Budget Office (CBO) has estimated the changes will result in higher monthly payments ranging up to \$1,190, depending on individual circumstances. Most affected beneficiaries will begin receiving their new monthly benefit amount in April 2025 (for their March 2025 benefit).

The law also provides lump-sum payments for those benefit increases dating back to benefits payable for January 2024. If a beneficiary is due retroactive benefits as a result of the Act, they will receive a one-time retroactive payment, deposited into the bank account SSA has on file, by the end of March. Anyone whose monthly benefit is adjusted, or who will get a retroactive payment, will receive a mailed notice from Social Security explaining the benefit change or retroactive payment.

WEP and GPO were intended to prevent “double-dipping” by individuals receiving pensions from non-Social Security-covered employment while also collecting Social Security benefits. However, they often led to significant financial penalties for public-sector workers and their families.

WEP affects people receiving a public pension who are also eligible for Social Security benefits based on covered work they did outside the public sector. The prior law imposed a more restrictive formula in calculating their benefit, which will no longer apply.

GPO affects those receiving public pensions based on their own work who are spouses/widows/widowers (including divorced, if married 10 years and currently unmarried) of Social-Security-covered workers. Previously, two-thirds of the monthly amount of their public pensions would offset dollar-for-dollar against any potential Social Security spouse’s benefit. That offset, which sometimes reduced Social Security benefits to zero, will no longer apply.

A spouse may receive up to half of their spouse's Social Security benefit at full retirement age. A surviving spouse, at full retirement age, generally gets 100% of the worker's basic benefit amount. If you never applied for retirement benefits due to WEP or spouse's or surviving spouse's benefits because of GPO, you may need to file an application. The most convenient way to do that is online at [www.ssa.gov/apply](http://www.ssa.gov/apply). If you are unable to create an account, call 1-800-772-1213 to verify the information SSA has on file.

The surviving spouse benefits application is not available online. For information about that benefit, you are advised to call 1-800-772-1213. When the system asks, “How can I help you today?”, say “Fairness Act.” Your answers will help SSA connect you to a WEP-GPO trained representative to take your application.

For current information about implementation of the Social Security Fairness Act, visit: [www.ssa.gov/benefits/retirement/social-security-fairness-act.html](http://www.ssa.gov/benefits/retirement/social-security-fairness-act.html).

by Robin Suits

## One Step Pound Cake

Lovers of quick and easy dessert recipes might want to try this one next time you're in a pinch for dinner guests or a potluck. My good friend, Nancy Beers, gets the credit for all of the compliments that I've received over the years.

### Ingredients

- 2 1/4 C all purpose flour
- 2 C sugar
- 1 C sour cream (room temperature)
- 2 sticks unsalted butter (room temperature)
- 3 eggs (room temperature)
- 1 tsp baking soda
- 1 tsp vanilla

### Instructions

Preheat oven to 325 degrees. Place all ingredients in mixer and mix at medium speed for three minutes. Pour/spoon batter into greased bundt pan and bake for 63-68 minutes. Cool on wire rack for 20 minutes. Add powdered sugar when cooled. Enjoy!

by Kathy Morris

## Volunteer Opportunity for Retirees

One of the best aspects of retirement is having the ability to choose where you spend your free time. If you happen to have some uncommitted hours and are interested in a purposeful and rewarding volunteer opportunity, Clothes That Work may be for you. Founded 25 years ago as a grassroots nonprofit, CTW provides professional or workplace clothing and soft skills training to people entering and re-entering the workforce. Volunteers serve as client coaches, assisting with interview and work attire clothing selection while providing guidance on interview soft skills to set them up for success. Other volunteers help with inventory management—where it all begins! These individuals greet and assist clothing donors and process those items for clients and the CTW Boutique. Opportunity also exists for those who might be interested in volunteering in the boutique by closing sales and packaging items. Just over a year ago, CTW purchased a mobile unit that takes client services to communities in Montgomery, Greene, and Clark counties, and new volunteers are welcomed to assist in this program as well. Located in the Montgomery County Job Center on Edwin C. Moses Boulevard, Clothes That Work invites you to check out their website at [www.clothesthatwork.org](http://www.clothesthatwork.org), or call 937-222-3778 for more information.

by Kathy Morris

## WSURA Board 2024–2025

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## Contact Us

E-mail: [wsura@wright.edu](mailto:wsura@wright.edu)  
 Website: [wright.edu/wsura](http://wright.edu/wsura)  
 Facebook.com/groups/WSURA

## Transitions for Seniors

Are you, or someone you know, helping to care for a “more senior” member of your family or a close friend? Is that person approaching a time in life when a change in their living arrangements is imminent?

Having experienced this scenario myself in the last year, I wanted to share information about a local company that offers a comprehensive array of services in a most personal and caring way.

Next Steps Senior Transitions was founded in 2009 by Allen Nelson. A tech manager by profession, he started the company after being downsized and recognized that his passion was not working with computers, but rather with senior adults and their families who needed assistance with the myriad details associated with downsizing, moving, and more.

Allen works with his team of six staff and family-owned business vendors to meet all requested needs of his customers. In some cases, the individual(s) chooses to stay in their home, but wants to reorganize and reduce their belongings to stay comfortable and safe. If a move to assisted living is determined, Allen meets with the individual and family to identify potential communities, select home furnishings and personal items for the new location and arrange for movers and staff to set everything in place. Once the senior is settled, the company can help family members with the coordination of details associated with the previous residence. In my situation, the home had furniture and special things that needed to be temporarily stored. Next Steps Senior Transitions played a major role in the careful boxing, packaging, and transporting of said items. The cleaning crew made sure that the house was spotless and all trash was removed in preparation for the realtor’s responsibilities (and if we had needed to find a realtor, they would have helped with that).

When I said that this was all done in a caring and personal way, I meant it. The family I was assisting wanted certain items to be stored for a future memorial service. Allen’s team, which had all stored boxes labeled before being transferred, made certain that those boxes were conveniently and visibly placed in the storage unit. He followed up with me and family members upon completion of all requested tasks to ask how things were going and whether we required any additional help. As he says, “Every transition is unique. If it matters to you, it matters to us.”

There are many other services they offer, including the coordination of shipments to loved ones, donations to charity, shredding, and paint/chemical removal. They even do home checks for snowbirds, short-term rehab patients, and vacationers in the South Dayton area. Allen’s small business totally supports other small businesses and only works with family-owned companies.

Let’s face it. Life changes can be overwhelming. It’s important to know that there are people who can provide important services with compassion, grace, and a very high level of competence. Anyone with questions can email Allen at [info@nextstepstransitions.com](mailto:info@nextstepstransitions.com). The website address is [www.nextstepstransitions.com](http://www.nextstepstransitions.com).



by Kathy Morris

## Estate Planning



On February 5 WSU's Office of Planned Giving and WSURA sponsored an informative session on estate planning led by WSU graduates Shon Anderson, president of Anderson Financial Strategies (left), and David Cusack, an attorney specializing in estate planning and estate administration (right).



Unfortunately, the weather was frightful, but many intrepid souls made their way to the Student Union anyway. Those who did were rewarded with a lot of useful information. The bottom line: if we already have an estate plan, we need to review it on a regular basis because things change. If we don't have one, we need to get one.

This information was geared to a wide range of listeners, from those who don't think they need a will (they do!) to those looking to deal with estates of more than \$28 million (not us!). Both presenters recommended that we put together an estate plan, and that we rely on the advice of trusted professionals to make sure our wishes will be carried out and respected. This is important, as there are consequences of not having an estate plan: most seriously, under Ohio law, if you don't have a plan, the state—not you—decides who gets your assets. For example, assets intended for children can end up being inherited by ex-spouses!

To make sure that our assets go to the people or organizations we want them to, and to make sure our wishes for our care as we age are respected, Shon and David provided a list of documents that we should prepare and review on a regular basis:

- **A last will and testament** outlines who inherits your assets and who will oversee your estate after you pass.
- **A durable power of attorney (also known as a Financial POA)** designates someone to handle your financial affairs on your behalf if you're unable to do so yourself.
- **A healthcare power of attorney (or healthcare proxy)** appoints someone to make medical decisions on your behalf if you can't communicate.
- **A living will (or advance healthcare directive)** records your preferences for medical treatment and life-support measures if you become severely ill or incapacitated.
- **Beneficiary designations** are forms that specify who receives assets such as life insurance, retirement accounts, or payable-on-death accounts.
- **A letter of instruction** that offers guidance to loved ones or executors, including passwords, final wishes, or other important details not covered in formal documents is optional but helpful.

Shon and David spent a fair amount of time discussing *revokable trusts*, which are legal entities that you can place assets into for easier management and distribution, often making probate (a court-supervised process to assign assets) unnecessary. (In probate, according to Bill Bigham, executive director of Planned Giving, a court determines that the will is legitimate and appoints an executor to carry out the will, inventory the estate's assets, pay outstanding debts and taxes, and distribute the remaining assets. Probate can be complex, lengthy and expensive—and the estate and family financial and personal information becomes public, all good reasons to avoid it.) A will, estate plan, living trust, or other tools, then, can take the burden off the estate's executor. A trust can give you more control over who gets your assets and when they'll be distributed. It can also solve problems, such as how to deal with a second home in another state; without a trust, assets like that might have to go through probate in both states! However, Shon and David were very clear that a will is the better choice for many.

The presenters encouraged the attendees to consider charitable giving in their estate plans. If you don't know where to start, you could contact your local council on aging, your community foundation, or talk with Bill Bigham, who would be happy to provide information whether or not you are interested in setting up a future gift for Wright State. In short, the presenters gave compelling reasons for creating an estate plan, even though most of us don't want to think about it—as David pointed out, 60% of adults don't have one. But we should!



## WRIGHT STATE UNIVERSITY

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### Join Us: Annual WSU Retirees Luncheon

The Annual WSU Retirees Luncheon will be held Thursday, May 8, 11 a.m.–2 p.m., in the E.J. Nutter Center Berry Room. The event, which is open to current faculty and staff as well as retirees, provides a wonderful opportunity for renewing old friendships and creating new ones. The doors to the Berry Room will open at 11 a.m. for social hour, and a buffet luncheon, including a vegetarian option, will begin around noon.

Joylynn Brown, Wright State director of athletics, will be our featured speaker. Brown is just the fourth director of athletics in Wright State history and the first woman named to the role. She has been associated with Raider Athletics for nearly three decades. We also will present the Lewis K. Shupe Faculty Service Award and Richard A. Johnson Staff Service Award to recognize the service of current retirees who exemplify their qualities.

The cost of the luncheon is \$30 per person. Tables of eight will be available for open or reserved seating. The deadline for registering is Friday, April 25. For more information, visit <https://www.wright.edu/events/annual-wright-state-university-retirees-luncheon-1>.

