

UMRA UNewsletter

A Communication of the University of Minnesota Retirees Association

NOVEMBER 2016

Join Kathryn Pearson to discuss 2016 election results at the November 15 program

This will definitely be an UMRA luncheon to attend! While the election is still two weeks out as I write this newsletter article, this election cycle and the results certainly will be analyzed and interpreted for years to come. To begin that analysis, Dr. Kathryn Pearson, University of Minnesota associate professor of political science, will join us for our November program to discuss the 2016 presidential campaign and election results including the Presidency, Congress, and Minnesota Legislature.

With a specialty in American politics, Dr. Pearson focuses her research on the United States Congress, congressional elections, political parties, and women in politics. She is a distinguished scholar in these areas and well known commentator on elections and politics across the nation and Minnesota, appearing regularly on national and Minnesota news. She is known to many of us as a contributor to the TPT public affairs panel on “Almanac.”

Her research has recently appeared in *The Journal of Politics*, *Perspectives on Politics*, *Legislative Studies Quarterly*, *Political Research Quarterly*, *Politics and Gender*, and in several book chapters and conference presentations. Pearson’s book, *Party Discipline in the House of Representatives*, was published in 2015 by the University of



Michigan Press. It combines quantitative data analysis and interviews of key elites to examine party leaders’ strategic use of their legislative prerogatives in rewarding loyal party members and punishing defectors. It is an extension of her dissertation that won the APSA Legislative Studies Carl Albert Award for the best doctoral dissertation in the area of legislative studies.

Dr. Pearson is working on a new book project, *Gendered Partisanship in the House of Representatives*, analyzing congresswomen’s pursuit of power in a partisan era. She is a recipient of the University of Minnesota Morse Alumni Award for Outstanding Contributions to Undergraduate Education. She has served as the advisor to 24 undergraduate honor students in Political Science and as graduate advisor to five students. Pearson is a valued University citizen, not only as an honored educator, but also in her service to the University, her college, and her department on search and curriculum committees.

In 2002–03, Pearson was a Research Fellow at the Brookings Institution. From 1994 to 1998, she worked on Capitol Hill as a legislative assistant for two members of Congress. She received her Ph.D. from the University of California, Berkeley, and earned her B.A. *cum laude* from Claremont McKenna. She joined the University of Minnesota faculty in the Department of Political Science in 2004. Please join me in welcoming Professor Kathryn Pearson to UMRA and to enjoy this robust discussion of the current U.S. political scene.

— Kathleen O’Brien, UMRA Board

UNIVERSITY OF MINNESOTA

NOVEMBER
LUNCHEON MEETING

Tuesday, November 15, 2016
11:30 a.m. – 1:30 p.m.

Featured Speaker

**Kathryn Pearson, U of M
associate professor of political
science, “Election Analysis”**

Location

Conference Room ABC,
Campus Club, Fourth Floor,
Coffman Memorial Union

Menu

Italian sausage lasagna with
Caesar salad, coffee and tea.
For vegetarian or gluten-free
options, please request when
making your reservations.

**Reservations are required
Deadline: Thursday, November 10
Prepayment of \$16 per person**

To reserve your place(s), you
may send your check payable to
UMRA to UMRA Reservations,
c/o Judy Leahy Grimes,
1937 Palace Ave., St. Paul, MN
55105-1728 or reserve online at
[https://umra.umn.edu/events/
lunch](https://umra.umn.edu/events/lunch)

Or, contact Judy before
Nov. 10 at 651-698-4387; e-mail:
Jleahy4654@aol.com.

Please honor the reservation
deadline date; if cancellations are
necessary, please call by Nov. 10.

Parking

All University ramps with UMRA’s
discount coupon — \$6 for the day.
Other ideas: Ride the LRT Green
Line; take the Campus Connector
bus from St. Paul; park early and
visit in the Campus Club lounge.

UMRA NEWSLETTER

FROM THE PRESIDENT

Elections closer to home

Yes, I know, we are just finishing with what seems the longest election in history, and you thought we did not need to think about elections for another year or two. However, there is an election early next year that is very important to the University of Minnesota. A joint convention of the 2017 Minnesota Legislature will be electing four members to the Board of Regents.

The Minnesota Legislature elects one Regent from each of Minnesota's eight congressional districts and four from the state at large. One of the four at-large Regents must be a University student at the time of his or her election.

Regent terms are staggered with one third of the seats up for election every two years. There are four positions open on the Board of Regents in 2017, one each from Minnesota's 2nd, 3rd, and 8th Congressional Districts, and one at-large position.

The process for the election starts with the Regent Candidate Advisory Council (RCAC). One of its duties is to recruit, screen, and recommend at least two, and not more than four, qualified candidates to the joint legislative committee for each of the openings on the Board of Regents. The RCAC will accept applications to the Board of Regents **until December 2**. At their meeting on December 9 they will review candidate applications and select which candidates to interview. By January 6, 2017, they will vote on the final candidates to recommend to the Legislature.

Do you know anyone who would make a strong member of the Board of Regents? If you do, please encourage them to apply to the RCAC. Having a strong Board of Regents is vital to the future of the University of Minnesota.

Specific information about the application process can be found on the RCAC web site: rcac.leg.mn

— Donna Peterson, UMRA President

Food for Thought from the Cares Committee

You do what you can for as long as you can, and when you finally can't, you do the next best thing.

You back up, but you don't give up.

— General Chuck Yeager, test pilot and astronaut

What's new on the UMRA website

Your webmasters have enabled the online luncheon reservation service as of November 1, 2016. You can now make a luncheon reservation for yourself—or yourself and spouse—on the website, and pay for it with your credit card via PayPal. We recommend that you follow the link <https://umra.umn.edu/events/lunch> and read the instructions there before starting. It is really a simple process, but PayPal does add a few steps you should avoid.

Next on our list of coming new services is an online member directory (for logged-in members only). This will not replace the printed directory, but it might offer some advantages, and will always be up to date.

— David Naumann and Cathy Lee Gierke, Co-webmasters

Apply for Professional Development Grants for Retirees before December deadline

Do you have a project that you would like to finish with the support of a small grant? Or perhaps you have a new project that you would like to start? The Office of the Provost, Office of the Vice President for Research, and the U of M Retirees Association have small grants (up to \$5,000) to help retirees pursue projects related to their scholarly and/or creative interests. All U of M faculty, P&A, and civil service retirees are eligible to apply, including employees retiring by July 1, 2017. **Application deadline is December 16.**

Eligible expenses include travel and per diem expenses, stipends for students, purchase of software, laboratory materials, editorial assistance, and other related expenses. The guidelines are on the UMRA website: <https://umra.umn.edu>. If you have questions, please contact Jan Hogan, UMRA grants chair, at jhogan@umn.edu.

Who do you know who's retiring?

If one or more of your colleagues, friends, or neighbors have retired recently or are even thinking of retiring from the University, be sure to share the good news that membership in UMRA is waiting for them.

Membership recruitment brochures are available at the sign-in table at each luncheon program.

Have you renewed your membership yet?

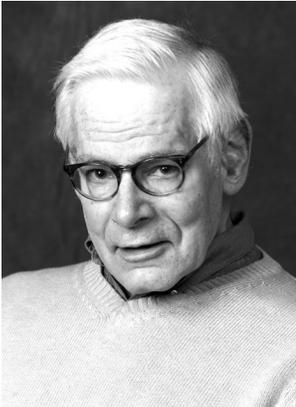
This summer you received a renewal request by e-mail or by U.S. mail. This is a reminder that memberships expired on August 31. Don't miss out on new benefits, the newsletter, and notice of upcoming UMRA activities.

November 15 Workshop —

If you could redesign long-term care ...

In a conversation with UMRA members and representatives from Care Guides/Cares Committee, we will look at how we would change long-term care. The discussion will be moderated by Dr. Robert Kane, director of the University Center on Aging.

The workshop follows the luncheon program on November 15; it will be an open discussion about “Redesigning Long-Term Care—Getting the Care We Really Want.”



The current care system can be a jungle of regulations, specialized facilities, and insurance (private, Medicare, Medicaid) rules—often conflicting and almost always confusing. Dr. Kane consults widely on these challenges and has freely offered his experience and expertise to UMRA members.

As families go about making arrangements for situations that demand different types of treatments or resources for their loved ones, they quickly learn about the problems and dysfunction of the current care system. The format of this workshop is an open discussion on the challenges in achieving care that is healing and satisfying for both patient and family.

“We want to tap your experiences, and concerns as well,” said Dr. Kane. “What lessons have we learned? How would we like to see care changed to bring it more in line with what people really want?”

Whether we are confronting an imminent health care problem of a loved one or considering what we would want for ourselves when the day comes for us to receive special expertise in settings for our own care, improving the current care system is in all our best interests.

Dr. Kane, UMRA Care Guides, and audience members will discuss the options and obstacles to “getting the care we really want.” Join us at 1:30 p.m. on November 15th.

— Earl Nolting, UMRA Cares Committee

References to read about this topic:

- *The Good Caregiver*, Robert L. Kane and Jeannine Ouellette, 2011
- *Complete Guide to Family Caregiving*, (Second Edition). Bucher, Peter Houts, and Terri Ades, Editors, 2011.

Year-end income tax reduction moves

The following suggestions are from Andy Whitman, UMRA member and professor in Carlson School of Management, who provided three financial workshops last spring.

1. Give from an IRA **directly** to a charity. This avoids showing the distribution as income on your 1040 and satisfies some of your Required Minimum Distributions. This is best for people in the lowest tax brackets who have a standard deduction. People in higher brackets have a reduction in income but the benefit is tempered by the reduction in charitable tax deductions and other tax reduction items that phase out as your income changes.

2. Make conversions from your IRA to Roth IRAs. If, in 2017, changes in the economy make this not an attractive move, consider recharacterizing some or all of those Roth IRA conversion amounts. Thus, you might recharacterize conversion amounts if those investments have decreased from their conversion taxable value and/or if your marginal tax bracket seems too high. This tax reduction follows Ed Slot’s advice to “move from forever taxed” on retirement distributions “to never again taxed” on funds in a Roth IRA.

3. Give appreciated assets, so you do not pay taxes on significant capital gains. This is a good planning technique that may have additional use this year with mergers such as the St. Jude’s sale to Abbott Labs.

4. Diversify. Have some funds in after-taxable accounts (a traditional investment account), some in tax-deferred accounts (regular IRAs and 401(a) and 403(b)), and some in tax free accounts (Roths). This allows flexibility in responding to the changing tax environment.

These and additional tax reduction moves before year end are listed in the Moodle site for UMRA financial workshops at University Retiree Association Seminars. Also on the Moodle site is information from the UMRA workshops presented last spring. Contact Andy at awhitman@umn.edu.

Care Guides available for consultation

UMRA Care Guides continue to be available for consultation when members are confronted by an unexpected health care situation, especially involving long-term care. To speak to a Care Guide, call the Center on Aging, 612-624-1185.

As a joint project led by the UMRA Cares Committee and the University Center on Aging, Care Guide volunteers are trained and supervised by the Center on Aging. They have available the center’s information resources to assist you with decision making. All discussions are confidential.

Committee ensures that UMRA's archival history takes root (and yours, too)

At our September meeting Kris Kiesling, director of Archives and Special Collections, was our luncheon speaker. She named and described the 14 areas of scholarship that comprise the Special Collections and showed illustrations of the types of items included in each.

After the luncheon, attendees were invited to tour the Elmer L. Andersen Library on the West Bank where the collections are housed. Curator Tim Johnson also treated the group to a description of the exhibit, "The Misadventures of Sherlock Holmes," which was to close soon.

Walking through the caverns below the library, members saw the seven special boxes in which UMRA's materials are currently housed in the University Archives. The materials date back to 1977, and include the presidential papers, the secretary's and treasurer's reports, membership lists, by-laws, operating manual, newsletters, and much more.



UMRA members saw the millions of items stored in the caverns as they toured the Archive Library in September.

You may not have known that UMRA has a History/Archives Committee. The charge of this committee is to collect and organize UMRA materials and to make them ready for deposit in the archives.

One of the exciting tasks of the History/Archives Committee is gathering information about key people (you) and their (your) influence on the development of UMRA, on your former department, the University, the community, your family, or any individual you may have mentored—a kind of post-retirement vitae.

We are interested in the kinds of activities YOU have been involved in since your formal retirement date. Let me hear from you. Retirees have an important place in history.

— Gloria M. Williams, chair
History/Archives Committee (gwilliam@umn.edu)

Tutors needed at Murray Middle School

The University Retirees Volunteer Center (URVC) presents this opportunity to make a difference in a child's life.

Murray Middle School provides an intentional intervention program called the "Pilot One-on-One Program" for at-risk students who are academically challenged. The program, now in its ninth year, focuses on students that typically do not have strong home support and are often living in crisis.

Students work individually with a tutor each day. Both the tutor and student study English, math, social studies, or science together. Students also work on developing the tools they need to improve their study skills.

Volunteers get to know the students because they see each other every week. Studies show that experiencing a caring relationship is critical to academic success in school.

All volunteers will attend a 90-minute training/orientation session prior to tutoring. At this session the program and Murray policies will be explained. A background check is required.

Murray is conveniently located just four blocks from the University's St. Paul campus at 2200 Buford Avenue. Tutors are needed Monday through Friday for one to three hours, scheduled from 11:08 to 12:08, 12:12 to 1:04 and 1:08 to 2:00 p.m. Just pick a day/time that works best for you for the semester. A training session can be scheduled most days at 8 a.m. or 2:30 p.m. upon your request.

For more information or to sign up for a training session, please contact the URVC Tutoring Coordinator, Pat Tollefson, p-toll@umn.edu.

Photo Club meets in new location this fall

The Photo Club meetings are at the Washburn Library, 5344 Lyndale Ave. South in Minneapolis, 1–3 p.m. The November meeting is the first Friday, November 4, and the December meeting will be the second Friday, December 9.

The UMRA Photo Club welcomes photographers of all abilities. Most of us are struggling amateurs who like to take pictures and want to get better. We benefit from the kind help we get from each other.

A number of Photo Club members gather before the meeting for lunch. Please contact Sheri Goldsmith at gold009@gmail.com for information about making a reservation for lunch or to be added to the Photo Club mailing list.

— Craig Swan and Sheri Goldsmith May,
Photo Club co-chairs

Highlights from the October program: a sampling of work funded by PDGR

The October program was a delightful sample of what can be done with an UMRA Professional Development Grant for Retirees. Kathleen O'Brien and Kathryn Fennelly talked about their projects. (See page 2 for PDGR information.)

O'Brien shared insights from 54 interviews she conducted with women from 35 cities in elected office from 1970 to 2000. Her grant paid for transcribing the interviews, but it also "gave me credibility and opened doors," she said. The Minnesota Historical Society has this archival collection, which includes the oral history interviews, transcripts, donated personal manuscripts, and memorabilia. She is planning to publish a manuscript and book of her findings.

Fennelly stated her appreciation for the PDGR funding that enabled her to adapt an e-course—one that she developed

for law enforcement personnel who work with immigrants, refugees, and asylum seekers—for use by other professional groups. Using her grant, she incorporated new interviews for social workers and health care professionals. Thousands of law enforcement, social workers, and health care personnel are now enrolled in the e-course in New York, where she now lives, and nationwide. For info: fenne007@umn.edu.



Speaking of powerful women who make things happen! L-R: Donna Peterson, UMRA president, 2016–17; Kathryn Fennelly, PDGR grant recipient; Jan Hogan Schiltgen, PDGR committee chair; Kathleen O'Brien, UMRA board member and PDGR recipient.

Welcome new members to UMRA

Please give a hearty welcome to new members who have recently joined UMRA. Greet them at luncheon meetings, and help introduce them to other members.

C. David Hollister, School of Social Work, Faculty
2200 Midland View Court N., Roseville, MN 55113
651-636-5788; dhollist@umn.edu

Diane L. Larson, Student Financial Aid, Civil Service
4435 Bloomington Ave., Minneapolis, MN 55407
d-hall@umn.edu

Rose Miskowiec, Political Science, Civil Service
705 85th Lane NW, Coon Rapids, MN 55433
763 571-1587; r-misk@umn.edu

F. Abel Ponce de León, Animal Science, Faculty
16 East Oaks Rd., St. Paul, MN 55127
651-766-8378; apl@umn.edu

Connie M. Schwartau, Food Science and Nutrition, Civil Service
1817 90th Ave., Balaton, MN 56115
507-734-3052; cooram@nobleswildblue.com

New members welcomed at reception in October



Book club chair Pat Tollefson (left) was happy to share ideas with new member Susan Rose about how to start another UMRA book group.

The annual reception offers the opportunity for new members to learn more about UMRA. Karen and Jim Storm chat with Earl Nolting about the discounts members enjoy.



Thank you to the University of Minnesota Foundation for helping to sponsor UMRA's November Newsletter.



Giving stock: a win for you...and the U!

Giving appreciated securities to the University can provide an immediate benefit for the U and is more tax-efficient than giving cash.

By gifting appreciated securities you have held for more than one year to the U, you may receive a double tax benefit. You will avoid capital gains tax on the appreciation of the stock, and you can claim an income tax deduction for the current fair market value of the gift—subject to applicable tax limitations.

For more information, contact Lynn Praska at lpraska@umn.edu or call 612-624-4158.

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 City, State _____
 Zip _____ Phone _____
 E-mail _____
 Other Info _____

Website: <https://umra.umn.edu>
 UMRA's phone: 612-626-4403

In Remembrance

We report the passing of UMRA members as we learn of losses to our UMRA community. Since the Newsletter was published last month, we have received news of the following. Our condolences to the friends and family of:

Irene C. Bossenmaier, staff member in the Department of Medicine, who died September 3, 2016. She was a member of UMRA from 1993 through 2014.

Barbara Brown Rynders died on September 24, 2016, at age 81. She was preceded in death by her husband, John E. Rynders, who passed away on March 29, 2016. Emeriti faculty from the Department of Ed. Psychology and Special Education, they were members of UMRA from 2008 to 2016.

UMRA Cares Committee is here for support

For assistance and support in the event of the death or serious illness of an UMRA member or family member, please e-mail us at umracares@umn.edu or call 612-626-4403, and leave a message for UMRA Cares.

Also, if you learn of someone who is facing a difficult life challenge, please contact the UMRA Cares Committee.

Thank you to the University Bookstores for helping to sponsor the UMRA November Newsletter. The Bookstores also offer a regular 10 percent discount to UMRA members. Shop the Bookstore on the ground floor of Coffman Memorial Union next time you attend an UMRA meeting.

Holiday Sale
Save 25%
 on almost everything in-store
 & online during our 4-day sale event
November 22-23 & 25-26

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*Some exclusions apply. See store for details.