

**UMRA Planning Retreat**  
August 9, 2016  
Midland Hills Country Club  
(Rinehart)

- I. Follow up discussion from survey data presented by John Anderson and Jeanne Markell.
  - a. UMRA membership: should we be concerned about smaller proportion of P&A retirees who join the Association relative to the faculty retirees?
    - i. Discussion of cultural differences within the campus community that are reflected in differing perceptions of “belonging” between faculty and staff. These differences vary across unit, dependent largely on leadership (e.g. Humphrey Institute’s ethos of equality)
    - ii. One of the great things about UMRA is all members are in the same classification: Retiree!
    - iii. Our communications need to be welcoming to all employee groups
  - b. Will the retirement of “Baby Boomers” over the next 20 years result in increased membership, whether we seek to grow or not? This issue is complicated: there may not have been a growth in hiring of boomers 40 years ago; there is no mandated retirement age, and some faculty/PA may continue to work longer.
  - c. Regarding getting information to all employee groups, what do we know about attendance at special events for retirees?
    - i. UMRA presence at HR retiree seminars events has been restricted to tabling, no opportunity to present.
    - ii. HR, citing HIPPA concerns, has previously restricted communication with retirees to one email/ mailing. A work-around has been developed and the plan is to institute it this year
    - iii. Efforts to recognize and/or keep retirees engaged in their colleges or departments vary significantly across campus. Several units offer special recognition (apparently spurred
    - iv.
    - v. by UMRA advocates) for their retirees each year (e.g. CBS, CLA)
    - vi. Suggestion was made to expand efforts to work through collegiate deans to inform all retirees of UMRA benefits and opportunities.  
**Sherilyn May volunteered to lead/pursue this approach for the Board**

*Discussion Topic 1: Membership Strategy –two alternative scenarios*

**Scenario One:**

UMRA Board should seek to broaden the activities, events, deliverables and University involvements for its members but let its growth in numbers develop organically.

Vs

**Scenario Two:**

UMRA Board should grow membership numbers more aggressively and consider broadening the activities, events, deliverables and University involvements for its members

*As the discussion developed, consensus emerged around the strategy suggested in Scenario One.*

Discussion:

1. Regardless of growth strategy, a key outcome of UMRA participation should be a sense of camaraderie and community. Retention of members is undoubtedly linked to their engagement with the organization.
2. The process of becoming a member, renewing a membership and registering for special events should be easy and efficient. On-line access to these activities has now been developed.
3. To enhance communication within UMRA, the re-vamped website can convey up-to-date announcements and has the capacity for blogs etc. Suggestion was made to include links to the website within the monthly newsletter.
4. Growth would raise even more concerns about our capacity to serve members at monthly luncheon presentations in our present venue. Survey results confirm that the crowded conditions at luncheons are frustrating for members and not welcoming for newcomers.
5. Perhaps the demand for the monthly luncheon/speaker event would moderate if UMRA created additional activities and events for members.
  - a. Activities suggested:
    - i. Travel (domestic/international)
    - ii. Less formal Happy Hour events at Campus Club; smaller, informal groupings for lunch
    - iii. Tours with presentation—e.g. Weisman
    - iv. Additional special interest groups
    - v. Reference was made to an organization that offers events in the various geographical quadrants of the Twin Cities, addressing the concerns that some have regarding the difficulty of traffic and transportation.
    - vi. Create a Social Committee, perhaps as a subcommittee of the Program Committee, to lead the development of experimental/trial events in the coming year. **Kay Thomas volunteered to lead this activity.**
  - b. Other approaches: *(note: several of these ideas overlap with issues raised in the later discussion regarding how UMRA can support the mission of the U)*

- i. Link/partner with other groups in sponsoring events that serve the U community: Alumni Association, UM Foundation, U Women’s Club, U Retirees Volunteer Committee. (cf. Venn diagram illustrating UMRA individual events and its intersections with other community organizations)
  - ii. Re-visit partnership with U’s community/governmental relations to assist in advocacy for the U
  - iii. Establish a free membership category that, for example, allows access only to newsletter.
  - iv. Should we consider a model like that at Michigan State which automatically provides one year free membership to all retirees?
- 6. **General agreement that the Board needs to actively investigate both creating additional engagement opportunities and identifying alternative venues for luncheon events.** John Anderson has compiled information regarding other venue options and their associated costs.
- 7. The Campus Club arrangement is favorable in terms of costs, and we have commitments to remain in the present location for 2016-17. Any change would need to be communicated with appropriate lead time.
- 8. The question was raised regarding the Board’s ability to address on-going business matters and these larger issues in the absence of formal staff support. A suggestion was later made the perhaps a shared position could be created serving UMRA, the U Women’s Club, and URVC.

*Discussion Topic 2: What does it mean to be “in service to the University”?*

- 1. The MOU regarding UMRA’s relationship with the University (currently under review in the Provost’s office), indicates that UMRA is “...dedicated to connecting retired faculty and staff...in lifelong, mutual support of the University and each other.”
  - a. There is an assumption of synergy among U retirees and the institution, but there is some question regarding the extent to which the University recognizes or avails itself of the capacity of retirees to provide ongoing support for its academic and service missions.
  - b. Efforts are needed to break the stereotype of being a retiree.
    - i. Many retired faculty continue their research and service activity because it is part of their personal/professional identity, and often, their work still references the UM as their academic home.
    - ii. Many other faculty and staff serve the U and the broader community through engagement on boards and other volunteer activities. While those impacted by these activities recognize the UM background of the retirees, the U itself doesn’t seem sufficiently aware of (or interested in) the broad reach and impact of these informal UM ambassadors.

- c. The University Retirees Volunteer Committee asks retirees to volunteer. Is there a sense that these activities are perceived as “free labor” for the U rather than meaningful engagement consistent with the larger U mission?
- 2. How can we encourage deans and other campus leaders to recognize the contributions U retirees are making? Recognition will probably require enhanced communication.
  - a. Gloria Williams reminded members of the importance of submitting yearly reports from UMRA committees for documentation in University Archives. These materials help convey the activity and impact of UMRA within the UM community.
  - b. This led to a broader discussion of the challenge of capturing the multitude of professional/personal accomplishments and contributions of UM retirees. This information would most clearly document how the UMRA benefits the U.
  - c. Could UMRA periodically get on the Board of Regents agenda to help disseminate this information?
- 3. In the past UMRA played an important role in relations between the U and the state Legislature. The Alumni Association plays a role in shaping opinion of lawmakers, and it has staff to manage phone banks for large scale advocacy. **Jeanne Markell has met with Alumni Association leadership and she volunteered to work with them to see what UMRA and they might do together.**
  - a. This led to discussion of shared UMRA office space in McNamara Alumni Center. Space is shared with U Women’s Club and URVC. Currently there may be some sense of imbalance in use of resources.
  - b. Suggestion was made to consider partnering to hire support staff to serve all three entities.
- 4. Reshaping the image of retirees among U community can be facilitated by
  - a. Promoting the idea of retirement as a “commencement” of new opportunities and engagements (not the end thereof)
  - b. Publishing stories (in the newsletter and on the website) of retirees who clearly are serving as ambassadors of the U in their new activities and involvements.
    - i. Ginny Hanson suggested creating a writers group who could take the information provided by active retirees and create impactful stories. Jerry Rinehart volunteered himself and his spouse Peggy Mann Rinehart to assist in this effort.
    - ii. Jean Kinsey volunteered to do some writing either of stories about retirees or other articles that can be used in the Newsletter or communications, e.g. Minnesota Daily
    - iii. Gloria Williams indicated that this kind of information can supplement the interviews of retiring U leaders captured in U Archives.

Items mentioned by participants as their “Take-Away” from Today’s Discussion—grouped by themes rather than sequence:

***UMRA Overall:***

- In addition to getting to know others whom we perhaps only knew in passing during our working years, UMRA also provides equalizing atmosphere for retirees from all employee classifications. Turf issues and hierarchy are in the past.
- Impressed by wonderfully articulate and intelligent people who happened to be retirees

***Activities:***

- Need to involve more members in activities
- A writing group is a good idea
- Collaborate with others doing similar things.
- Work on systematic involvement of members.

***Concerns:***

- Need HR to provide all retirees emails
- We need to work on the venue issues
- Need to use email to contact retirees (NOTE: Gloria Williams email address is [gwilliam@umn.edu](mailto:gwilliam@umn.edu) ; there is another Gloria Williams whose address may pop up.)

***UMRA Board:***

- Clarified the role of the UMRA Board
- Today’s session brought the Board together
- Good to see everyone working together and a common focus;
- UMRA has grown regarding ideas of volunteering and involvement
- Have a sense of renewal for UMRA
- Good comradeship and gathering around central issues
- As an outgoing member, pleased about continuing collegiality