

UMRA Retreat, 11 August 2016

Title: UMRA's Mission and Vision: Steps Moving Forward

Goal: To provide direction to the UMRA Board for their deliberations about membership strategy and involvement and outreach with the larger University and the community.

Takeaways:

- (a) Recommended direction on membership size and scope of activities
- (b) Topics for UMRA Board discussion/decision in 2016-2017.

UMRA Retreat Agenda:

9:30 Arrive, breakfast snacks and coffee

9:45 Introduction to the agenda and the goals of the retreat – Jean Kinsey

10:00 Get-acquainted exercise – Jeanne Markell

10:20 Review Trends in Membership – John Anderson
Review Results of 2016 UMRA Survey of Members – Jeanne Markell

11:00 Introduce Moderator – Jerry Rinehart; Scribe – Julie Medbery
Discussion Topic 1: Membership Strategy (See subtopics below)

Scenario One:

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

Scenario Two:

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

12:00-12:30 Lunch served – break

12:31 – 1:00 – Summary of discussion of Topic 1: Direction for growth and questions for the UMRA Board address in next 2 years.
Identify volunteers to work on specific issues.

1:01 Topic 2: What does it mean to be “in service to the University?”
How can/do we support the mission of the University? (John Adams’ insights/progress)
Linkages with other U organization e.g. Alumni Assoc., Foundation
Do we want to advocate for the programs of these organizations?

2:15 Summary of discussion for Topic 2: Direction for involvement with the University and questions for the UMRA Board to address in next 2 years. Identify volunteers to work on specific issues.

2:30 Revisit UMRA strategy in light of the day's discussion

3:00 Adjourn

Notes:

Scenario One:

- UMRA continues to strive for the status quo in terms of size of its membership (around 500)
- Continue using current methods of reaching out to potential members (HR lists, word of mouth, U of M retiree planning workshops)
- Invest board efforts not so much at growth of membership but rather at organization's deliverables to members and to the University.

Scenario Two:

- UMRA sets a goal of more aggressive membership recruitment and determines strategies to get there
- Consider broadening the definition of membership to include folks who may not have "retired" but consider the U of M their primary career affiliation
- Invest board efforts in planning for growth, including impacts on venues, resources and marketing and communications plans

From our Web site:

UMRA Mission

The mission of this association shall be to promote, protect, support, and advocate for the interests, rights, needs and welfare of persons who retire from the University of Minnesota. More specifically, UMRA goals are:

- To help retirees successfully deal with the retirement process, both during their retirement year and into their retirement years;
- To provide all retirees broad intellectual stimulation as well as social and recreational services;
- To oversee and assist in the ongoing provision of benefits affecting the health and wellness of retirees;
- To facilitate opportunities for voluntary service to the University and community;
- To contribute to the development and welfare of the University and its mission and goals.

From our MOU with the UMN (yet to be signed):

WHEREAS, UMRA is a dues-paying, membership organization dedicated to connecting retired faculty and staff (P&A, Civil Service, & Bargaining Unit employees) of the University and their spouses in lifelong, *mutual support of the University* and each other;

Handouts:

Membership Trends, Membership graphs

Survey Summary

UMRA Financial Status

John Adams Vision

MOU

Brochure