

UMRA Continuity Task Force Annual Report—FY 2022

Personal health and family issues, in addition to a significant focus on the potential merger of UMRA and URVC, limited the formal activity of the Organizational Continuity Committee (OCC) this past year. Not unexpectedly, there was a drop in quality and quantity of responses to calls last fall for annual reports and document/ web site updates. Clearly, tending to organizational housekeeping is not yet part of UMRA culture.

The activity of the UMRA/URVC Merger Work Team (which included Rinehart and Gierke), however, was significantly related to continuity and organizational history. In the process of exploring issues associated with the possible reconnection of the two organizations, the Work Team came across numerous documents related to previous efforts to enhance their interactions. These items and other interesting historical issues related to continuity are included in the Merger Work Team's final report (Attachment x). These materials fill in some of UMRA's missing history between 1983 and the present.

In addition, bringing these two organizations together in service to the University's to the University's retirement community is clearly aligned with organizational efficiency and effectiveness. The Work Team report which recommended re-affiliation of the two groups was reviewed and approved by the leadership of both organizations in May 2022.

We approach this new year with a strong commitment to ensuring UMRA retains the historical records and has access to current information needed to operate effectively and efficiently. Committee member and webmaster Cathy Gierke has been leading our efforts this summer (2022) trying to ensure these documents (annual reports, website materials, tool kits etc.) are submitted as intended in September 2022. We developed and distributed the call for annual reports (Attachment 1), and a new call for document/website updates which sought to clarify ownership and updating responsibilities for key organizational documents stored on the UMRA website (Attachment 2). We will be tracking results this fall to assess UMRA's effectiveness in providing these important reports and updates.

We recognize, however, that success in these efforts requires the direct support of the President and Executive Committee. We recommend that a portion of Executive Committee and/or Board meetings should periodically focus on the status of key web documents and discussions of the annual reports—e.g. the highlights/ accomplishments /challenges they identify. The representative from the Organizational Continuity Committee could tee up the particular issues and frame the discussion. As an on-going form of orientation for new members and refresher for veterans, we believe these conversations would spur information sharing, promote organizational problem solving, and increase board member awareness of the breadth and depth of UMRA's activities. Finally, knowing that annual reports and document revisions are actually read and have utility would likely improve responsiveness to the annual call for updates.

As we move forward, we note that Chip Peterson is stepping down from his co-Chair position. Chip has served as UMRA Secretary, President-Elect, President, and for the past several years as a past-Past President and Board member. His attention to significant organizational and operational details have added significantly to UMRA's efficiency and effectiveness. Fortunately, he will continue to serve on the committee. We are hopeful that we can demonstrate appreciation of Chip's efforts over these many years by striving to maintain our organization's history and to continue efforts to improve its effectiveness.

This fall the UMRA Board will need to consider the appropriate configuration of the committee's leadership.

The Organizational Continuity Committee for 2022-23 is intended to include the following people/ positions:

Co Chairs: Jerry Rinehart and [TBD]

Webmaster: Cathy Gierke

UMRA Archivist: Julia Wallace

UMRA Historian: unfilled*

UMRA Secretary: Julie Sweitzer

Communication and Outreach Committee Chair: Jean Kinsey

UMRA President: Ron Matross

UMRA President-Elect: Eric Hockert

Member-at-Large: Chip Peterson

*It is important to note that an Archivist is not the same as a Historian, and this latter position remains unfilled.