

## **2023-24 Annual Report**

### **UMRA Membership and Communications Committee**

Ron Matross, Chair

August 28, 2024

**Members:** Michael Austin , Kris Bettin, Will Craig, Cathy Lee Gierke, Virginia Hanson, Nancy Helmich, Kathy Jensen, Virgil Larson, Deanne Magnusson, Ron Matross, Jan McCulloch, Jan Morlock, Kris Mortensen, Lynn Slifer, John Sullivan

**Resigned:** Leslie Koidahl, Bev Moe

The Membership and Communications Committee was formed in the fall of 2023 by merging the previous Membership and Communication/Outreach Committees. The chairs of the two previous committees wished to move on, and it was a logical time to analyze the functions of the two committees. This analysis found that there was a considerable overlap between the two committees, with both engaging in outreach activities. The Board approved a proposal to merge the two committees.

#### **Membership trends**

The Committee counts memberships in the Fall, after the majority of renewals have taken place. Our membership report is appended. Some highlights include:

- Through October 7<sup>th</sup> 2023, UMRA total membership reached a six-year high of 808, including 189 new members and 619 continuing members. Compared to final figures for 2022, total membership increased by 31%, continuing membership by 28%, and new membership by 42%.
- Renewal rates rose from 71% in 2022 to 88% in 2023.

The Committee attributed these increases to: (a) increases in the number of retirees (b) a return to a full-slate of in-person forums and social events (c) efforts of the Hosting Team to reach out to new members and incorporate them into our activities (d) a change in the renewal cycle that encouraged members to renew in the spring rather than the fall.

#### **Dues increase**

The Committee's first order of business was to examine our annual membership rates. Dues had not been raised since before the pandemic, while inflation had increased the organization's costs substantially. We concluded that a dues increase was necessary. There was also concern that the couples membership category needed to be revamped because the difference between dues for a couple and for a single member was too large, disadvantaging singles. The Committee recommended, and the Board approved, an increase from \$30 to \$40 for a single membership and a raise from \$40 to \$60 for a dual membership ("dual" being a more inclusive term than "couples).

## Strategic planning

The Committee devoted most of its time and energy to developing a strategic plan for outreach to prospective members, current members, and the University community at large. Three subgroups examined current and past outreach to each of these three constituencies, and reported back for discussions with the whole Committee. The result was a report that contained numerous recommendations for enhanced efforts to recruit and retain members, and promote a positive image for UMRA. The full report is appended. Three of these proposals were implemented in the spring:

- **Add the year of joining UMRA to name tags** at in-person events in order to enhance conversation (and connection). *(Implemented, Spring 2024)*
- **At each in-person forum single out one or two interest groups for special mention.** The SIG leader or the host) could briefly mention what they do. Have people who have been involved with the group to stand up at their tables. Also have SIG handouts, as well as suggested retirement resources lists available at the Silver Gophers table at each forum *(Implemented, Spring 2024)*
- **Enhance our Facebook** presence by having more contributions and periodic emails to members to remind them of the organization's page. *(Implemented Spring, 2024)*

Many more ambitious proposals for both outreach to members and the community are detailed in the full report.

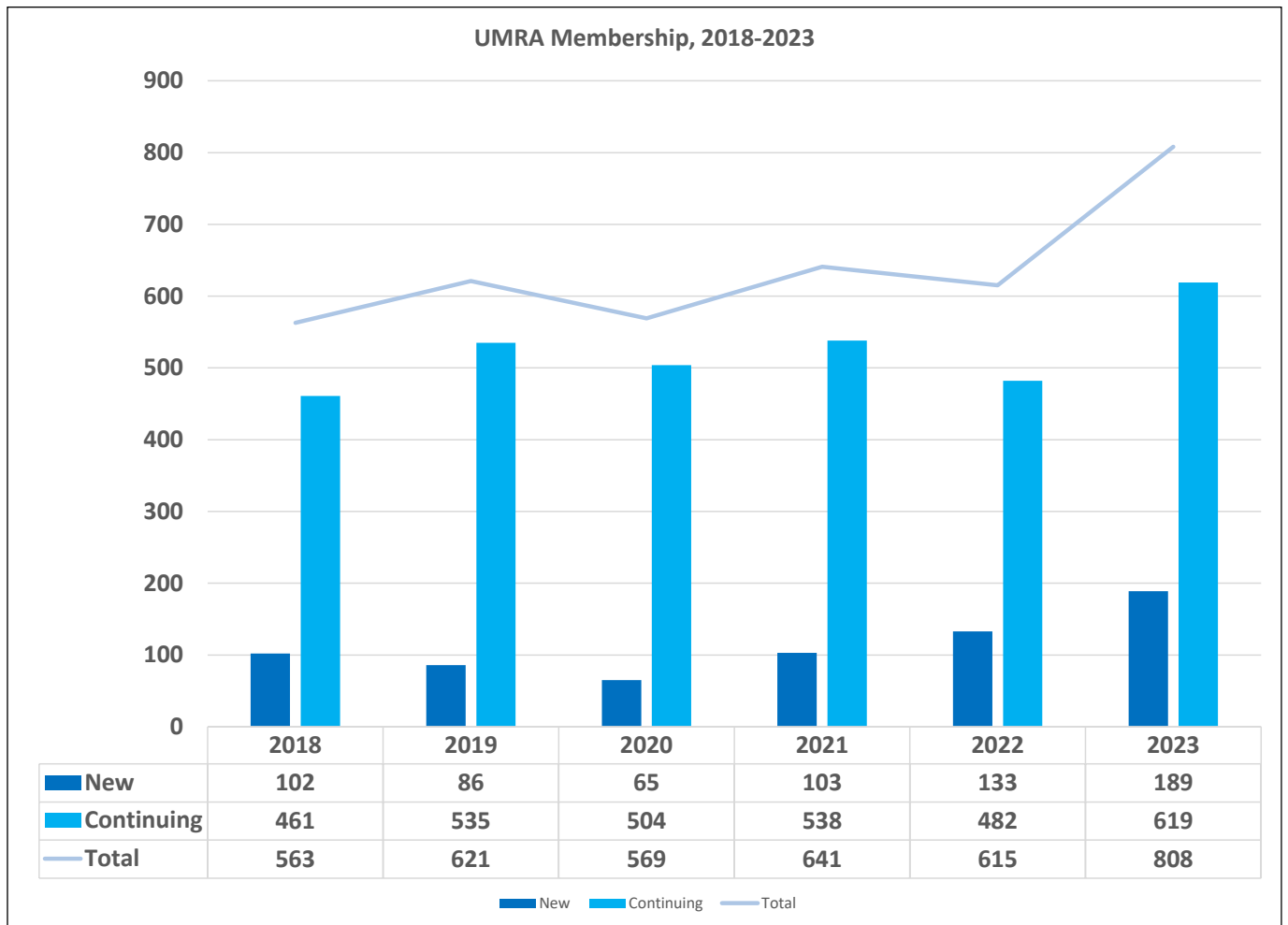
## Outlook for 2024-25

Having developed planning ideas, the Committee will concentrate on implementation of several of our proposals, as well as helping to guide and manage UMRA's ongoing communications—the newsletter, website, and renewal cycle. Two other issues will receive attention:

- **Searching for database/association management software.** Our current systems for keeping track of our members and communications with them are outmoded and too dependent on outside help. Cathy Lee Gierke will be leading an effort to find modern software that can make our efforts more effective and efficient.
- **Outreach to the coordinate campuses.** President Erk Hockert initiated an effort to reach out to retirees from the Morris and Duluth campuses to learn about their needs and how UMRA might be able to help them. The Committee will follow up on initial overtures.

**Appendix A: UMRA Membership Report, Fall 2023**  
**Membership and Communications Committee**  
**11/15/23**

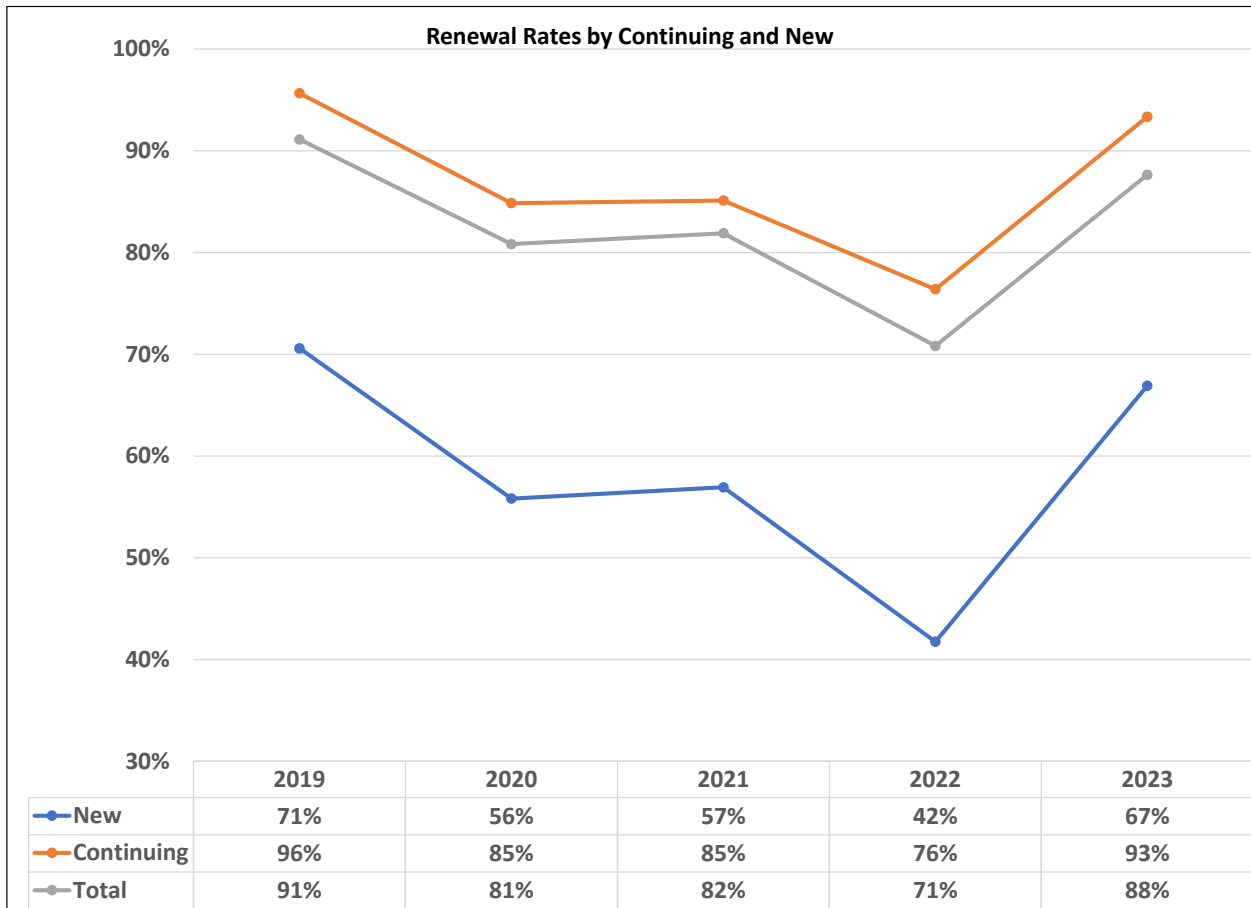
So far, 2023 has been a very positive year for UMRA membership. Through October 7<sup>th</sup> 2023, UMRA total membership has reached a six-year high of 808, including 189 new members and 619 continuing members. Compared to final figures for 2022, total membership has increased by 31%, continuing membership by 28%, and new membership by 42%.



**Renewal Rates**

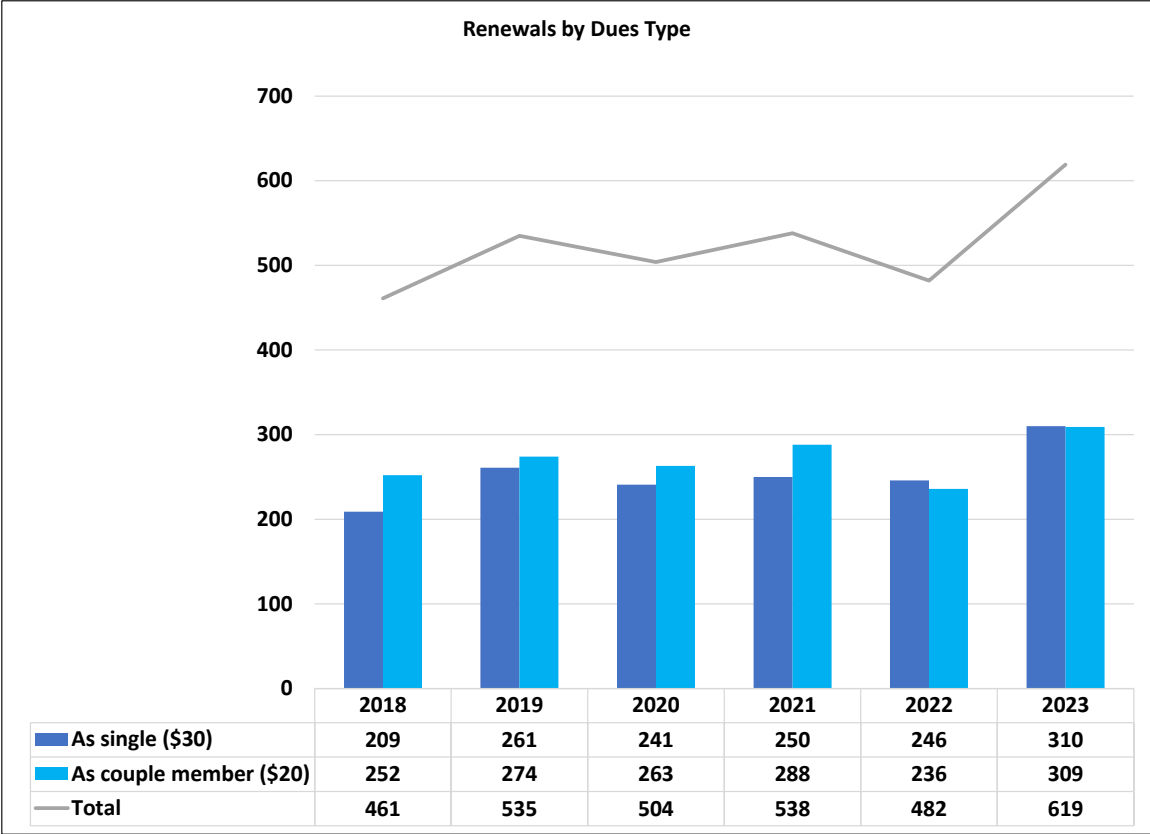
An important measure of interest in the organization are the renewal rates of members from the previous year. Of particular interest are the renewal rates of members who were new the previous year, since their first-year membership was free. As the chart below shows, renewal rates peaked before the pandemic in 2019, and then plunged during the pandemic years, reaching a nadir of only

76% for continuing members and only 42% for new members. In 2023, rates rebounded to nearly the 2019 levels, with 93% of continuing members and 67% of new members renewing.



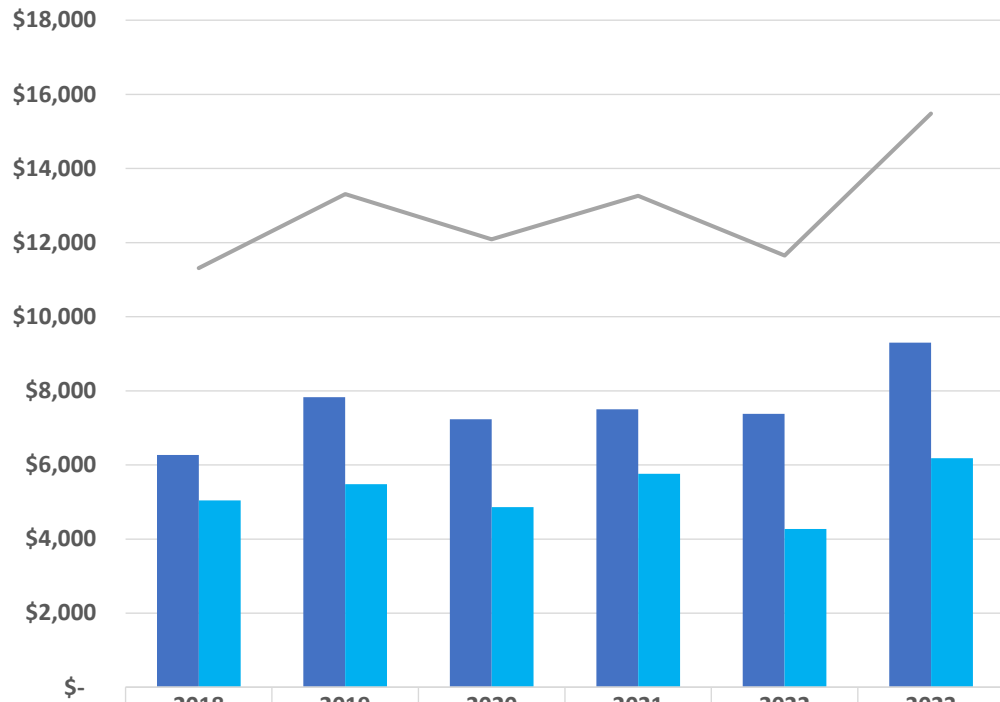
### Renewals by Dues Types

UMRA has had a two-tiered set of annual dues rates. For the past few years, the rates have been \$30 for single memberships and \$40 for a couple (meaning that each member of a couple paid a \$20 rate). Until the last two years, we’ve had more members paying the \$20 rate than the \$30 rate. As the following charts show, even though they have been greater in number, couples members have given us less revenue.



Revenue in 2023 is already projected to be the highest ever, 33% more than that in 2022.

Revenue by Dues Type



|                           | 2018     | 2019     | 2020     | 2021     | 2022     | 2023     |
|---------------------------|----------|----------|----------|----------|----------|----------|
| ■ Singles (\$30)          | \$6,270  | \$7,830  | \$7,230  | \$7,500  | \$7,380  | \$9,300  |
| ■ As couple member (\$20) | \$5,040  | \$5,480  | \$4,860  | \$5,760  | \$4,270  | \$6,180  |
| — Total                   | \$11,310 | \$13,310 | \$12,090 | \$13,260 | \$11,650 | \$15,480 |

## **Appendix B: A Plan For Enhancing UMRA's Outreach Efforts**

### **UMRA Membership and Communication Committee**

**July, 2024**

In the Fall of 2023 the UMRA Membership and Communications committees were combined into a single UMRA Membership and Communication Committee. Among its activities, the committee engaged in a year-long strategic planning process to assess UMRA's outreach efforts and propose ways to improve them.

We conceived of UMRA's outreach activities as comprising three areas:

1. Recruiting and welcoming new members
2. Retaining current members and deepening their involvement
3. Making UMRA a known and respected member of the University community

Subgroups of the committee were formed to consider each area, addressing these questions:

1. Current and past activities. What are we currently doing in this area? Are there things we have done in the past, but are no longer doing?
2. Metrics. Are there measures of how well we are doing in this area? How can we evaluate the success of new efforts?
3. Improvements and new activities. What can we do to improve our current activities? What new activities might we consider?

Each subgroup produced a report which was presented to the whole committee. This summary report combines and reorganizes the findings and recommendations from each subgroup. We discovered that the metrics for assessing performance were similar across all the areas, so they are combined into a single metrics section. We also found that the activities to create a positive image overlapped the activities to recruit new members, so they are combined. Finally the efforts to welcome new members and retain current members seem to be part of the same fabric.

## **I. Recruiting new members and creating a positive image for UMRA**

### **Current and past efforts**

UMRA has sought to recruit new members and to keep the University community informed about the organization in a number of ways.

- Sending, through the Office of Human Resources (OHR), a physical letter to employees who are about to retire, inviting them to join UMRA. Similar letters are also sent to those who are 1, 2, and 3 years post-retirement. The continuation of these letters is part of the UMRA Memorandum of Understanding with the Office of the Provost.
- Offering prospective members a free first year of membership

- Sending the UMRA newsletter to a “VIP List” of key administrators and others around campus
- Having a table at the annual Age Friendly University Day and presenting at the annual virtual Age Friendly University conference. In the past, we also had tables at pre-retirement seminars and health benefits fairs put on by the Office of Human Resources, but these events are no longer held.
- Having a handout (formerly brochure) and a PowerPoint presentation for use at in-person and virtual events.
- Having liaisons who work with the U of M Alumni Association, the Board of Regents, and select University committees
- Making available recordings of select forums and workshop on the Alumni Association’s “Gold Mind” repository of talks from University experts
- Maintaining the UMRA website with both the history and current activities of the association
- Presenting about UMRA at an annual dinner for new faculty retirees from CLA.
- Making available recordings of selected UMRA workshop and forum speakers to Gold Mind, a repository of University presentations maintained by the Alumni Association.
- Maintaining a Facebook page for the group, listing events and items of interest to retirees.
- Serving on a panel organized by the Office of the Provost to discuss the social and psychological aspects of retirement with retiring faculty. This effort was started this past year, and we hope it can be repeated and expanded
- Seeking donations from University-related organizations to sponsor our newsletter and forums
- For selected events of general interest, submitting notices for the University’s *Brief* newsletter

### **Ideas for enhancing outreach to pre-retirees and the community.**

- **Get a presence on OHR’s pre-retirement web pages.** Since OHR is no longer doing the workshops, we should get space on their website with links to our site.
- **Offer pre-retirement planning assistance.** Work with the Provost’s Office and OHR to do more pre-retiree seminars like the recent panel that had UMRA members discussing their transitions to retirement and how they are using their retirement.
- **Develop more ways to reach out to colleges and departments.**
  - Try to expand our presence at collegiate pre-retirement events like the CLA Dean’s dinner. Enhance our communications with deans, department heads and communications coordinators, using the newsletter VIP list and the URVC contact list.

- Better publicize the UMRA grants program (PDGR) to colleges and departments, first to let pre-retirees know about the program, but also to let them know when one of their retirees has earned a PDGR grant.
- Coordinate, where possible, the publicity efforts of the URVC and the rest of UMRA. Ensure that UMRA and the URVC are seen as allied
- Post information on collegiate and departmental bulletin boards. A related idea is to have an UMRA hold an “office hour” in a collegiate office.
- **Equip officers and other members with an improved presentation package.** Our current handout and PowerPoint presentation are serviceable but could be enhanced to make them more appealing. We should also make them easily available for members to use if they are presenting at events.
- **Get media coverage for the organization.** A good candidate for this is the Silver Gopher Service Corps. Try to get the MN Daily or Star Tribune to highlight the efforts of the Silver Gopher volunteers at an event like the Admissions Office new student welcome days.

## II. Retaining and involving new and current members

### Current and past efforts

**Welcoming new members.** Following the pandemic years of 2020 and 2021, UMRA has strengthened its efforts to welcome new members.:

- The UMRA Hosting Team welcomes new members attending in-person forums by reaching out to them with special invitations and pairing them with continuing members to accompany them at the event, and introduce them to others.
- Before most forums, the UMRA president leads an informal session for new members introducing them to UMRA and all it offers.
- When we were in the Campus Club, the president spoke as part of an informal mixer with new and current members in the Campus Club bar. The logistics of our current Midland Hills location don’t permit this mixer.
- Previously, we also contacted new members before the forums and asked them to complete a survey on their interests in participating in various UMRA activities and leadership groups. We then passed on names for follow-up to relevant UMRA SIG and government leaders. We haven’t done this since moving to Midland Hills.
- The Social Events committee has reserved ten places for new members at the popular “Cabinets of Curiosity” events which showcase interesting places on campus. All these slots fill up.

**Encouraging renewal.** We have an annual email and letter cycle whereby we send renewal notices and reminders to members to renew. UMRA used to have a renewal date of September 1, with renewal notices going out in mid-summer, and continuing into the next calendar year. Last year we

changed the renewal date to July 1, with the first renewal letters going out in mid-May and ending in the fall. We also changed the content of the letters to have more of a marketing tone. Our renewal numbers and rates increased in 2023 and the changes in the cycle may have helped our numbers.

**Encouraging involvement.** To encourage participation, UMRA has simply tried to offer a wide variety of activities to appeal to different tastes and situations:

- Maintaining our signature luncheon forums with engaging speakers to keep us informed about our world.
- Keeping our living well workshops virtual, in order to reach members who can't easily attend in-person events
- Encouraging participation in special interest groups
- Expanding the opportunities to be involved. Examples include the Cabinet of Curiosity tours, our summer socials and riverboat cruises, the Silver Gopher Service Corps, and newer special interest groups like the Family History and Hiking groups. These expanded opportunities have generally been successful and well-attended.
- Publicizing our events to members through the newsletter, emails and our Facebook page.

**Encouraging volunteers for UMRA work and leadership.** We currently have no systematic effort aimed at bringing members into leadership or volunteer roles. We have advertised for help in the newsletter with occasional effect. Our main recruiting takes place by personal invitation. It has been easier to recruit for positions on the Board than for work roles, including putting on Zoom programs, hosting out forums, and managing our database. Pre-pandemic, we held a leadership retreat which brought together committee chairs, officers, and board members to discuss issues around the long-term future of the organization. It increased camaraderie among the leaders but didn't necessarily bring in new people.

### **Ideas for enhancing welcome and involvement efforts**

- **Add the year of joining UMRA to name tags** at in-person events in order to enhance conversation (and connection),. (*Implemented, Spring 2024*)
- **At each in-person forum single out one or two interest groups for special mention.** The SIG leader or the host) could briefly mention what they do. Have people who have been involved with the group to stand up at their tables. Also have SIG handouts, as well as suggested retirement resources lists available at the Silver Gophers table at each forum (*Implemented, Spring 2024*)
- **Expand the Cabinets of Curiosity reserved new member slot** idea to other UMRA social and special interest group events.

- **Restore and routinize the new member interest surveys**, and work to integrate the interest data with our other membership data. Have a mechanism for sharing names of interested people to special interest group leaders.
- **Develop an annual “participation index”** that quantifies a member’s degree of participation. We capture enough data on registration for forums, workshops and some social events and special interest group meetings to make this feasible. We could use the index to identify and reach out to those with low participation, and to invite into leadership those with higher participation. This index would only be an approximation because many small group activities wouldn’t be covered, but it could nevertheless be useful
- **Target our renewal mailings.** Send targeted appeals to selected groups, appealing to their special situations. Foremost among those groups are those coming off their free first year of membership.
- **Enhance our Facebook** presence by having more contributions and periodic emails to members to remind them of the organization’s page. (*Implemented Spring, 2024*)
- **Have local coffees.** Over the years in UMRA , there have been several proposals for organizing small group meetings of UMRA members but none ever happened. We think it’s worth experimenting with some initial events, with the following characteristics:
  - **Informal.** No registration required. Just show up.
  - **Local.** Find volunteers in different areas to organize them, and then issue personal invitations to UMRA members in that area, e.g., west metro, east metro etc.
  - **Autonomous.** Leave it to the volunteer coordinators to decide how to put them on. One might simply invite people to come to a restaurant or coffee shop at a given time, and let them buy their own refreshments. Another might choose to invite people to their home. Or one might organize an event in an apartment complex (e.g., Pillars of Prospect Park.)
  - **Organized discussion or not.** The convener could choose to make the gathering a totally no-agenda one, or they might offer a topic to talk about.
- **Develop an all-member interest survey and targeted communications.** While we have had a new member interest survey, the organization also needs to have periodic interest surveys of all the members. These would ask about interests in our various groups, including our special interest groups, and most importantly, our committees and leadership posts. Those who expressed particular interests could be given personal invitations to get involved.
  - To be optimally effective, the survey data would need to be integrated with the membership database, along with attendance data. This should be a consideration when developing a new database system for the organization.
  - A limitation of surveys is response rates. These days, we are lucky to get 20-30 percent response rates, meaning that we have no information from a majority of members. One solution is to try to build some surveys into an administrative process like joining or

renewing UMRA membership. In doing this, we would have to be very careful to make questions brief enough that they don't impede the renewal process.

- **Increase efforts to recruit members to help with UMRA.** Like other higher education retirement organizations, UMRA has had difficulty getting members to volunteer for work and leadership roles in the organization. We need to work on the problem more systematically, in a number of ways:
  - Regularize and amplify calls for volunteers. We can amplify our open advertising for help by having (a) a help wanted page on the UMRA website, (b) a regular help wanted column in the newsletter, and (c) calls at our forums and other events.
  - Provide tools for personal recruitment. It is understood that personal invitations to become involved are more effective than open calls. The interest survey targeting could be used to identify people who might be invited to help out in an area of need.
  - Limit the perceived and actual extent of involvement. People are naturally wary of open-ended commitments. We are likely to have more success if we make clear that the assumption of work and leadership roles will involve defined tasks and be time-limited, e.g., handling reservations for a year. We can also look to invite people to participate with a short-term, specific project, or “re-imagining” the work in a particular area. Those who help out in a small way may become more amenable to helping out in a larger way.

### III. Metrics for measuring the success of our efforts

We need to routinize capturing data that suggest whether we are having success in attracting and retaining new members, and increasing their involvement. These data should be in reports that are standardized and run at a particular time each year, so that we can make comparisons from year to year.

#### Suggested metrics

- **Number of members and new members.** The most fundamental of metrics. Membership is affected by many things, but trends must reflect, to a certain degree, the effects of our efforts. We have, of course, computed these numbers in the past. We should routinize them, to make sure we count in a consistent way on a given census date.
- **Number and percentage of current members renewing,** While people may not renew for a variety of reasons, renewal rates must partially reflect on the appeal of the organization.
- **Number and percentage of new members who renew and pay dues after their initial free enrollment period.** Since the pool of potential renewals is within our “sphere of influence”, the percentage renewing may more directly indicate our welcoming efforts than other indices.
- **Changes in amount of involvement.** If we were to have an annual participation index, we could keep track of the numbers who have increased their participation from year to year.

This incomplete data could be augmented by reports from special interest group leaders and committee chairs on involvement in their groups.

## University of Minnesota Retirees Association (UMRA)

DATE: June 13, 2024  
TO: UMRA Officers and all UMRA members  
FROM: John S. Anderson, Moderator of UMRA listservs  
RE: Email listservs of UMRA

UMRA has two active email listservs which are used to facilitate distribution of information about UMRA and its activities. The UMRA-Members listserv includes all UMRA members with active email addresses. The UMRA-Board listserv includes UMRA Officers and Board members. Persons authorized to make changes to these listservs and monitor the messages are John Anderson, Cathy Lee Gierke and Virgil Larson. Most messages get distributed but spurious messages are deleted by the moderators.

The **UMRA-Members listserv** is updated as new members are received. Each year email addresses of members who have not renewed their membership are deleted. A unique issue this year is the necessary change in email address for many members in response to the University's announcement that *umn.edu* email addresses will be discontinued in December of 2024 (with the exception of emeritus faculty). Members who adopt a new email address should update their profile on the UMRA membership page of the UMRA website (<https://retirees.umn.edu/login>). Changes recorded there will be uploaded to the UMRA-Members listserv on a monthly basis through December of 2024. As of June 13, 2024 this listserv has 852 entries. Messages to this group should be addressed to [UMRA-Members@lists.umn.edu](mailto:UMRA-Members@lists.umn.edu).

The **UMRA-Board listserv** is updated annually in midsummer when the newly elected officers and board members begin their terms. This listserv includes a contact in the office of the Executive Vice President and Provost in accordance with the provision of Section 2b of the Memorandum of Understanding to keep the Provost's office informed of all Board meetings and official actions of UMRA. As of June 13, 2024 this listserv has 23 entries. Messages to this group should be addressed to [UMRA-Board@lists.umn.edu](mailto:UMRA-Board@lists.umn.edu).

## UMRA SPONSORSHIPS (2024-2025)

### CONTACT LIST AND SPONSOR ASSIGNMENTS

#### SEPTEMBER – Print Newsletter + eNews

|                        |                 |              |  |
|------------------------|-----------------|--------------|--|
| UMF (1/4 page + Forum) | Jennifer White  | 612-625-8676 | <a href="mailto:whit0559@umn.edu">whit0559@umn.edu</a>           |
| Bookstores (1/2 page)  | Whitney Sletten | 612-666-2088 | <a href="mailto:slett130@umn.edu">slett130@umn.edu</a>           |
| PPP (1/2 page)         | Ann Sechter     | 812-874-3460 | <a href="mailto:asechte1@fairview.org">asechte1@fairview.org</a> |

#### OCTOBER - eNews

|                     |                 |                    |  |
|---------------------|-----------------|--------------------|--|
| Bookstores (eNews)  | Whitney Sletten | 612-666-2088       | <a href="mailto:slett130@umn.edu">slett130@umn.edu</a>           |
| PPP (eNews + Forum) | Ann Sechter     | 612-874-3460       | <a href="mailto:asechte1@fairview.org">asechte1@fairview.org</a> |
|                     |                 | Cell: 651-492-0162 |  |

#### NOVEMBER – Print Newsletter + eNews

|                          |                |              |  |
|--------------------------|----------------|--------------|--|
| UMF (1/4 page + Forum)   | Jennifer White | 612-625-8676 | <a href="mailto:whit0559@umn.edu">whit0559@umn.edu</a>           |
| PPP (1/2 page)           | Ann Sechter    | 812-874-3460 | <a href="mailto:asechte1@fairview.org">asechte1@fairview.org</a> |
| Bakken Center (1/2 page) | Kit Breshears  | 612-624-2141 | <a href="mailto:kit@umn.edu">kit@umn.edu</a>                     |

#### JANUARY - eNews

|                       |               |              |  |
|-----------------------|---------------|--------------|--|
| Bakken Center (eNews) | Kit Breshears | 612-624-2141 | <a href="mailto:kit@umn.edu">kit@umn.edu</a>                     |
| PPP (eNews + Forum)   | Ann Sechter   | 812-874-3460 | <a href="mailto:asechte1@fairview.org">asechte1@fairview.org</a> |

#### FEBRUARY - eNews

|                     |                 |              |  |
|---------------------|-----------------|--------------|--|
| UMF (eNews + Forum) | Jennifer White  | 612-625-8676 | <a href="mailto:whit0559@umn.edu">whit0559@umn.edu</a>           |
| Bookstores (eNews)  | Whitney Sletten | 612-666-2088 | <a href="mailto:slett130@umn.edu">slett130@umn.edu</a>           |
| PPP (eNews)         | Ann Sechter     | 812-874-3460 | <a href="mailto:asechte1@fairview.org">asechte1@fairview.org</a> |

#### MARCH – Print Newsletter + eNews

|                          |                |              |  |
|--------------------------|----------------|--------------|--|
| UMF (1/4 page + Forum)   | Jennifer White | 612-625-8676 | <a href="mailto:whit0559@umn.edu">whit0559@umn.edu</a>           |
| PPP (1/2 page)           | Ann Sechter    | 812-874-3460 | <a href="mailto:asechte1@fairview.org">asechte1@fairview.org</a> |
| Bakken Center (1/2 page) | Kit Breshears  | 612-624-2141 | <a href="mailto:kit@umn.edu">kit@umn.edu</a>                     |
| OLLI (eNews ONLY)        | Kate Schaefer  | 651-260-8562 | <a href="mailto:k-scha@umn.edu">k-scha@umn.edu</a>               |
|                          | Arne Johnson   |              | <a href="mailto:arne@umn.edu">arne@umn.edu</a>                   |

**APRIL - eNews**

PPP (eNews + Forum)

OLLI (eNews)

Ann Sechter

Kate Schaefer

Arne Johnson

812-874-3460

651-260-8562

[asechte1@fairview.org](mailto:asechte1@fairview.org)

[k-scha@umn.edu](mailto:k-scha@umn.edu)

[arne@umn.edu](mailto:arne@umn.edu)

**MAY – Print Newsletter + eNews**

UMF (1/4 page + Forum)

PPP (1/2 page)

OLLI (1/4 page)

Jennifer White

Ann Sechter

Kate Schaefer

Arne Johnson

612-625-8676

812-874-3460

651-260-8562

[whit0559@umn.edu](mailto:whit0559@umn.edu)

[asechte1@fairview.org](mailto:asechte1@fairview.org)

[k-scha@umn.edu](mailto:k-scha@umn.edu)

[arne@umn.edu](mailto:arne@umn.edu)

2024-2025 Financial Support by Sponsor:

|            |   |
|------------|---|
| UMF        | \$2700 (same as 2023-2024)                |
| PPP        | \$3950 (increase of \$250 from 2023-2024) |
| Bookstores | \$1050 (same as 2023-2024)                |
| Baaken     | \$1350 (increase of \$550 from 2023-2024) |
| OLLI       | \$ 800 (increase of \$500 from 2023-2024) |

TOTAL \$9850

Updated— July 22, 2024 [Beverly Moe]