

# UMRA Annual President's Report

DATE: August 29, 2024  
TO: Jerry Rinehart, OCC Co-Chair  
Cathy Lee Gierke, OCC Co-Chair  
Julia Wallace, UMRA Archivist  
FROM: **Eric Hockert, UMRA President** (July 1, 2023 – June 30, 2024)  
RE: Annual Report 2023-2024 (FY24), UMRA President

## Title and duties of the officer

The President is the chief executive officer and represents UMRA in carrying out the actions and directives of the Board of Directors and the membership. The President is responsible for the operation of the organization.

## Key Activities/accomplishments

The University of Minnesota Retirees Association (UMRA) continued its growth and success serving the social, educational, and volunteer interests of its members over the past year. Membership has increased from 675 in FY20 to over 900 in FY24 – more than a 33% growth over the past four years. Some of the key activities include monthly luncheons and living well workshops, special interest groups, and volunteer projects in support of the University of Minnesota and the surrounding communities. Support to the university also includes contributions by current UMRA members of over \$33 million to the Foundation during its most recent campaign. Members and others associated with the University Retirees Volunteer Center (URVC) portion of UMRA contributed 1,000's of hours of volunteer time to both university projects and to community organizations. Recent initiatives included an expanded role for UMRA's liaison to the Board of

Regents and outreach to the other university campuses and their retirees to more fully engage them with UMRA specific to their local interests.

### **Challenges/problems faced/solved**

Unfortunately, the university decided to terminate UMN.edu email accounts effective December 7, 2024 for retirees who do not have emeriti status. This action will also end access to many other important university systems including the potential to eliminate access to several online library resources. UMRA devoted a great deal of energy, investigation, and time to propose alternative approaches the university could take but without success. UMRA appreciates the kind consideration and helpfulness of all the university IT individuals working to assist members migrate their accounts to other email systems including the inappropriately named “alumni.umn.edu” accounts. The IT people were friendly and helpful. The decision to terminate retiree email accounts was not.

### **Suggestions/recommendations**

1. Board of Regents Liaison
  - a. Continue to support this role and encourage active engagement with the Regents to identify topics of interest to them where UMRA and its members can provide valuable expertise and insights into their deliberations to the benefit of the university.
2. Provost’s office
  - a. Start the process to review and renew the MOU.
  - b. Continue to engage with Beth Lewis and Ole Gram to identify additional ways UMRA can provide insights to current faculty on their retirement decisions and experiences when they retire e.g. Retirement Planning Panels.
  - c. Identify other ways UMRA can support the university including mentoring young faculty and post-docs.

- d. Take steps necessary to assure emeriti UMRA members know how to confirm their status in the HR system to be sure they retain their IT access e.g. UMN email accounts.
- 3. Financial
  - a. Highlight the donation process to UMRA members i.e. button on UMRA website. Share the success we've already had with donations.
- 4. Campus Club
  - a. Finalize decision regarding UMRA membership on the Campus Club Board. We currently do not have a seat on the Campus Club Board.
- 5. Campus outreach
  - a. Continue to support efforts to engage other campuses' retirees in UMRA activities and leadership roles e.g. Morris SIG.

## **Highlights**

### **Events serving members' interests**

One of the main activities for UMRA is our social events. These include monthly in-person forums with an invited speaker who shares insights into the world both inside and outside the university. The in-person forums were held at Midland Hills golf course this year due primarily to cost increases associated with the Campus Club and easier physical access to the Midland Hills location. There is no forum in December and the January and February forums are online via Zoom to increase participation by members who may spend winter months remotely or who may not want to drive during inclement weather. We also hold monthly online Living Well Workshops via Zoom that typically showcase a topic of personal health interest presented by an expert in the field and most often a university faculty

member. Other activities that promote social connections among members include a winter holiday party, a summer picnic, a boat ride on the Mississippi River, and this year an outing to a Twins baseball game in cooperation with the Alumni Association.

### **Special Interest Groups (SIGs)**

These groups continue to be popular with members and includes hiking, photography, book clubs, armchair traveler, family history, and financial and legal issues. We started an outreach to other campuses to engage them more fully with UMRA and are now considering establishing their local retirees as special interest groups (SIGs) specific to their local areas. This designation will give them access to UMRA's website where they can create their own webpages for communication and other uses with their local members.

### **Organization and Operations**

UMRA is organized and operated through the Executive Committee, the Board of Directors, the SIG's, and committees.

#### **Board of Directors**

The Board is comprised of 20 members elected by the entire UMRA membership to 3-year terms. Each Board member is expected to contribute to UMRA's operations and leadership in at least one role beyond the Board. The UMRA Executive Committee is drawn from the Board and is comprised of the President, President-elect, Treasurer, Secretary, Past-President, and the URVC Leadership Council Chair.

The main committees include the following-

- Program
  - Organized and puts on the forums, workshops, and special social events
  - The President-elect serves as the Chair of this committee
  - A Host Team helps assure that all members feel welcomed at these get-togethers and this year implemented several activities including identifying a current member to host each new member who attends a forum luncheon.
  - Cabinets of Curiosity was added to the committee and offers tours of various campus locations that proved to be very popular e.g. tour of the St. Paul campus gardens, university libraries and other locations.
- Membership and Communications
  - This includes the newsletter and eNews, website, webinar production (Zoom), the membership database, and Facebook administration.
- Organizational Continuity
  - This committee has become an important part of UMRA's institutional memory and organizes annual reports from each leadership role in UMRA. These reports are compiled, stored, organized, and summarized for consideration by the Board for their actions in each coming year.
- Professional Development Grants for Retirees (PDGR)
  - The Provost's office provides a small amount of funding to be used by UMN retirees to continue their scholarly work in retirement. This committee solicits proposals and makes recommendations for individuals to receive this financial support yearly.
  - This UMRA committee recommended seven of ten proposals be funded with awards ranging from \$2,000 to \$5,000. We appreciate the continued support for this program from the Provost.
- Travel
  - This small but important committee organizes international travel opportunities for members.

- UMRA Cares
  - This committee sends condolences to relatives of members who die and also alerts UMRA’s communication group of recent deaths so notices can be included in newsletters.
- Financial
  - Overall financial status is good. We continued to be financially responsible and ended the year in positive territory.
  - We created a new process on the UMRA website to accept financial donations.

## **University Governance**

- UMRA is actively engaged with the University of Minnesota through its governance and other channels
  - University Senate committee membership by UMRA members includes the Benefits Advisory Committee, the Senate Committee on Faculty Affairs (SCFA), and the P&A Senate.

## **Other University Engagements**

UMRA is a 501c4 non-profit that is formally associated with the University of Minnesota through a Memorandum of Understanding (MOU) with the Provost.

Provost’s Office - We worked with Beth Lewis and Ole Gram to hold an online (Zoom) retirement planning panel (Spring 2024) where several UMRA members (retired faculty) described their personal experiences related to their decisions to retire from the university and their lives in retirement. The attendees were current faculty who might be considering retirement. We also included discussions surrounding mentoring young faculty and post-docs, outreach to other

campuses, and the process to confer emeritus status as it related to retention of IT rights in retirement.

Age Friendly University Council – hosted by the Center for Healthy Aging and Innovation (CHAI) in the School of Public Health. UMRA has one member on the Council. UMRA continued its tradition of participating in the Age Friendly University Day in McNamara with a table describing UMRA and our activities.

Alumni Association (UMAA) – UMRA has a liaison to UMAA who coordinates volunteer and social activities. A Partnership Agreement has been in place in 2020 and is up for renewal in 2024. Many selected UMRA recorded programs were posted on UMAA’s Gold Mind site.

University of Minnesota Foundation – UMRA maintains a connection with the Foundation and periodically invites them to speak to UMRA about current giving and ways to continue to financially support the university.

Board of Regents – This year we recruited John Finnegan (former Dean of the School of Public Health) to lead an expanded liaison role with the Board of Regents. Following John’s discussions with UMN leadership we decided to approach the Regents to determine their interest in a more complete engagement with UMRA. The meeting was successful and everyone felt this could be good for the Regents to seek UMRA’s expertise and insights from our many accumulated and historical years of experience inside the university. I look forward to seeing this role develop over the coming years to the benefit of the Regents and to the benefit of the university.

Presidential Search – The Star Tribune published UMRA leadership’s letter to the editor where we expressed our views on the qualities we thought important for the university’s next president.

CLA – I spoke about UMRA at their emeriti dinner in McNamara – a tradition over the past several years.

OLLI (Osher Life Long Learning Institute) – I met with Kate Schafers (OLLI Director) to explore ways we can engage each other in addition to the current OLLI sponsorship to UMRA and the volunteer opportunities for UMRA members to propose and teach OLLI courses. These opportunities are identified and shared through UMRA’s volunteer center (URVC).

## **Engagement with groups outside the university**

UMRA has several connections with other groups.

- Big Ten Retirees Association (BTRA)
  - Most of the Big Ten schools with retiree associations meet twice a year to share experiences and best practices. This year’s meeting was at The Ohio State University (Columbus, OH). UMRA hosts the summer conference on our campus in 2026. The Provost’s office has already provided initial support for the conference by establishing an email account for our use for communications and registration activities. We look forward to additional support as the date gets closer.
- Association of Retirement Organizations in Higher Education (AROHE)
  - UMRA is a member of AROHE and has two members on the AROHE Board – Cherie Hamilton is AROHE President-elect (term starts January 1, 2025 for a 2-year period) and Eric Hockert (AROHE Board member).
  - AROHE includes over 100 higher ed retirement organization from across the United States and Canada.
  - It provides resources to help these groups support their individuals interests in retirement.
- University Women’s Club



- I met with the President (Linda Boss) to explore ways our two groups might engage each other. This was part of a continuing conversation that other UMRA leaders have had with the Women’s Club. Although no specific actions came out of these discussions we are hopeful the future may bring about something more concrete.

## UMRA Leaders (July 2023 – June 2024)

<b>Board of Directors</b>		<b>Other UMRA Roles</b>
2020-2023, 2023-2026	Barbara Shiels	Program Committee Volunteer URVC
2023-2026	Brad Clary	Program Committee
2023-2026	Diane Gihl	Host Team BTRA 2026 Planning Team
2021-2024	Diane Young	Host Team Lead Social Events Committee Member (Como Lake, River Cruise, Holiday Event) Volunteered for BTRA 2026 Conference Planning
2020-2023 Past-President	Frank Cerra	Government Relations
2020-2023, 2023-2026	Jan McCulloch	Host Team Camera Club Special Social Events Membership and Communications
2021-2024 Past-President	Jan Morlock	Special Social Events lead Program Committee Cabinets of Curiosity Membership Committee Communications Committee Facebook administrator
2022-2025	John Bantle	PDGR Chair
2018-2021, 2021-2024	Kai-May Terry	Hiking Club

2022-2025	Kate Maple	Special Social Events Committee PDGR
2023-2026	Michael Hancher	Host Team new member host SCFA representative (confirmed?)
2022-2025	Russell Luepker	Nominating Committee BTRA 2026 committee Senate Benefits Advisory Committee
2023-2024	Wendy Pradt Lougee	Program Committee
2019-2022, 2022-2025	Will Craig	Liaison to the Alumni Association Periodic organizer of events for Social Activities Committee Special Events Group Alumni Association Coordinator for updating Map of Membership   University of Minnesota Retirees Association (umn.edu)
<b>Executive Committee (also Board members)</b>		
Past President	Ron Matross	Campus Club liaison Membership Communications Committee Chair
Treasurer	Kristy Frost-Griep	Silver Gophers volunteer URVC Treasurer
President Elect/Program Chair	Julie Sweitzer	Hiking Club SIG Silver Gopher Service Corps Armchair Traveler Family History SIG Former Board Secretary
Secretary	Laurie Koch	Photo Club Fourth Friday Book Club
URVC Council Chair	Jerry Rinehart	URVC Chair
President	Eric Hockert	Big Ten Retirees Association conference (2026)

<b>Committees (Leaders)</b>		
Program	Julie Sweitzer	
Host Team	Diane Young	
Special Social Events	Jan Morlock	
Cabinets of Curiosity	Sally Kohlstedt	
Membership and Communications	Ron Matross	
Newsletter Editor	Kris Mortensen	
Producer (webinars)	Kris Mortensen	
Technical Director (in-person A/V)	Virgil Larson	
Webmaster	Cathy Lee Gierke	
Facebook administrators	Jan Morlock Cathy Lee Gierke Gary Engstrand Kathy Jensen	
List servs UMRA-Members@lists.umn.edu UMRA-Board@lists.umn.edu	John Anderson Virgil Larson Cathy Lee Gierke Ron Matross	
Travel	Cherie Hamilton	
PDGR	John Bantle	
Nominating	Ron Matross	
Organizational Continuity	Jerry Rinehart Cathy Lee Gierke (Co-Chair)	
Archivist	Julia Wallace	
UMRA Cares	Jeanne Markell	
<b>Special Interest Groups (SIGs)</b>		
Armchair Traveler	Lynn Anderson	
Book Club 1	Pat Tollefson	
Book Club 2	Dorothy Marden Margaret Catambay	
Family History	Lynn Anderson	
Family History	Craig Swan	
Financial and Legal Issues	Andy Whitman (Bob Hall shadow Andy)	
Hiking Club	Bev Moe	
Photo Club	Sheri Goldsmith May	
Photo Club	Craig Swan	

<b>URVC</b>		
	Jerry Rinehart	
<b>Groups</b>		
Travel Tours	Cherie Hamilton	
Journal of Opinions, Ideas and Essays (JOIE)	Kristine Bettin	
Member Benefits	Bev Moe	
Member Discounts	Bev Moe	
Sponsorships	Bev Moe	
<b>UMN Organizations (Representatives - voting)</b>		
Senate Committee on Faculty Affairs (SCFA)	Michael Hancher	
Benefits Advisory Committee (2 people)	Nancy Fulton	
Benefits Advisory Committee (2 people)	Russell Luepker	
Civil Service Senate (Consultative Committee?)	Bev Moe	
Age-Friendly UMN Council	Eric Hockert	
Campus Club Board	Ron Matross	
<b>UMN Organizations (Liaisons - non-voting)</b>		
Senate Committee on Finance and Planning (SCFP)	Gary Engstrand	
Board of Regents	John Finnegan	
Alumni Association (UMAA)	Will Craig	
P&A Senate	John Butler	
P&A Senate Consultative Committee	John Butler	
VP for Research	John Bantle	
Office of the Executive VP and Provost	Eric Hockert	
UMN Foundation	Bev Moe?	
	Frank Cerra - advocacy	
Government and University Relations	Jerry Rinehart - URVC	
<b>Non-UMN organizations (Liaison)</b>		
Big Ten Retirees Association (BTRA)	Eric Hockert	
Big Ten Retirees Association (BTRA) - By-Laws	Julie Sweitzer	
Big Ten Retirees Association (BTRA) - Admin Board member	Ron Matross	
BTRA 2026 conference (at UMN)	Eric Hockert	
AROHE (President-elect)	Cherie Hamilton	
AROHE (Board member)	Eric Hockert	

<b>UMN Organizations</b>	<b>Liaison to UMRA</b>	
UMN Foundation	Lynn Praska	
Provost's Office (see MOU)	Deb Cran	