

**UMRA Retreat 25 August 2020**  
**Keeping and Growing a Vibrant Organization**

<b>Time</b>	<b>Item</b>	<b>Description</b>	<b>Lead Person</b>
9:00-9:10 AM	Opening and welcome Zoom guide for today	Plenary	Frank Cerra Jake Kramer
9:10:-9:40 AM (30 min.)	Breakout #1	Introduce yourselves; why do YOU belong to UMRA?	Team facilitator and participants
9:40-10:50 AM (12 min. each)	<u>State of UMRA</u> Overview Member Survey PDGR impact study URVC partnership Big 10 Counterparts	Status Report Results Survey results Department visits Program status	Bill Donohue Ron Matross Will Craig Eric Hockert Jerry Rinehart, Jan Morlock
10:50-11:15 AM (25 min.)	Breakout #2	How vibrant are we? Reflections and ideas	Team facilitator and participants
11:15-11:30 AM (15 min.)	<u>Biobreak</u>		
11:30-11:55 AM (25 min.)	Using Zoom to engage our members	Technical training session	Jake Kramer

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11:55 AM-12:40 PM (45 min.)	Plenary Sessions 1.Forums (10 min.) 2.Workshops (10 min.) 3.Organizational Memory and Continuity (15 min.)  4.Zoom behind the curtain (10 min.)		1.Jan Morlock 2. Ron Matross 3. Jerry Rinehart, Chip Peterson, Cathy Gierke 4.Kris Mortensen
12:40-1:05 PM (25 min)	Breakout #3	Your team's recommendations for a vibrant organization	Team facilitator and participants
1:05-1:50 PM (45 min.)	Keeping and Growing a Vibrant Organization	Plenary; teams report; brainstorming	Moderator, Frank Cerra; Screen-share doc with scribe
1:50-2:00 PM (10 min.)	Closing		Frank Cerra

PURPOSE: TO  
DETERMINE  
MEMBERS'  
SENTIMENT ON  
VIRTUAL  
PROGRAMMING AND  
RESUMING  
IN-PERSON MEETINGS

# Spring 2020 UMRA Members Survey

## Most Endorse Virtual Forums and Workshops

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86% of those seeing it rated the first online forum with Myron Frans as Excellent or Very Good.

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72% said that they would be interested in attending online forums, and another 25% said they might be.

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43% said they would be interested in attending online workshops, and another 48% said they might be.

Many are  
Interested in  
Other Virtual  
Programming

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66% checked that they would be interested in online armchair traveler presentations.

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42% checked that they would be interested in online book discussions.

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Only 17% checked that they would be interested in online cocktail hours..

Members are conservative about resuming in-person meetings

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66% said they wouldn't return to in-person meetings before they have been vaccinated for Covid 19.

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53% said they would wait until there was an effective therapeutic drug.

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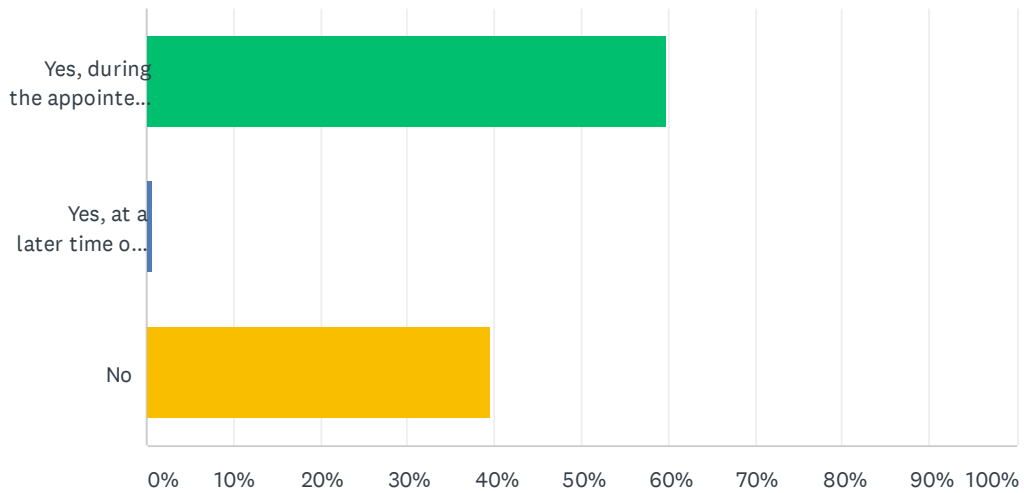
52% said they would wanted to see an observed decline in Covid 19 cases and deaths before returning.

## Suggested Program Themes (See Report Detail)

- Racial justice, including achievement gap
- The pandemic and how to deal with it
- Current University planning
- Future of higher education
- Financial planning and well-being
- Downsizing and end-of planning

# Q1 Did you view or listen to the May 19th UMRA Forum webinar with Myron Frans?

Answered: 162 Skipped: 1

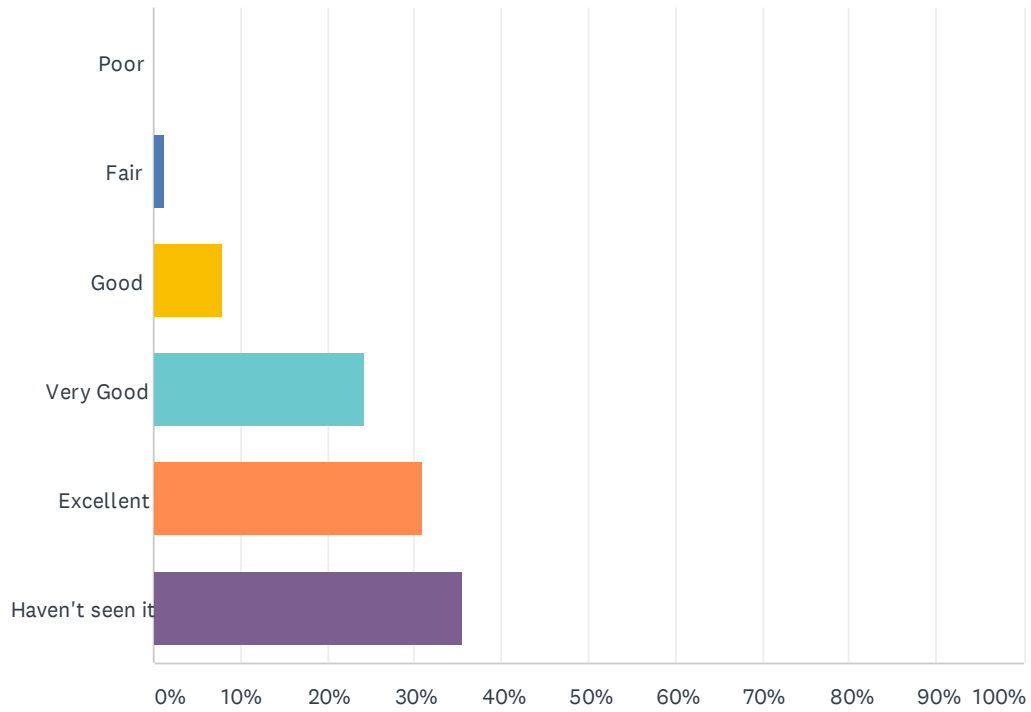


ANSWER CHOICES	RESPONSES	
Yes, during the appointed time	59.88%	97
Yes, at a later time on the website	0.62%	1
No	39.51%	64
<b>TOTAL</b>		<b>162</b>



## Q2 How would you rate the Myron Frans webinar?

Answered: 152 Skipped: 11



ANSWER CHOICES	RESPONSES	
Poor	0.00%	0
Fair	1.32%	2
Good	7.89%	12
Very Good	24.34%	37
Excellent	30.92%	47
Haven't seen it	35.53%	54
<b>TOTAL</b>		<b>152</b>

## UMRA Spring 2020 Survey

#	COMMENTS	DATE
1	I had another Zoom session (yoga) at the same time as the Myron Frans webinar.	5/28/2020 10:27 PM
2	Sorry I had to miss it. Something else came up that day.	5/28/2020 7:31 PM
3	Myron gave an excellent overview of the State finances and the needs of the University	5/27/2020 4:15 PM
4	I wasn't available to join the webinar on May 19th and didn't know we could view it later (option in question #1.)	5/26/2020 9:49 AM
5	He is the real deal. He knows everything he needs to know about state finance and plenty about the Univeristy. A plus is he is married to Judge Susan Segal. I've worked with her quite a bit and she is also spectacular.	5/24/2020 11:44 AM
6	Wish the entire U of MN community can hear him. After all-- all are related to the fiscal strength and generosity of the state of MN govt.	5/23/2020 8:50 PM
7	However, I have had the option to listen to him in a different setting related to the U-MN (confidential so cannot disclose) and did not leave with a sense of confidence. He seemed to talk the party line at least when he worked for Mark Dayton.	5/23/2020 9:52 AM
8	A great "Big Picture" presentation.	5/23/2020 9:02 AM
9	We were disappointed. He spent his time glorifying the U and reviewing info we already knew. We were expecting some insights.	5/22/2020 8:53 PM
10	It was very informative.	5/22/2020 5:55 PM
11	It was acceptable but not very attention holding. Talking w/o powerpoints or other visuals tends to become rather dull. It had a lecture-like atmosphere to it.	5/22/2020 5:02 PM
12	The topic was a little dry but otherwise everything was very good.	5/22/2020 3:48 PM
13	A bit too much congrats for fellow officials but some helpful information	5/22/2020 3:11 PM
14	Well organized. Flowwed smoothly. Was informative.	5/22/2020 2:29 PM
15	Few questions were received from viewers - not enough time to allow for responses.	5/22/2020 2:18 PM
16	Fact filled, informative and helpful to understand this extraordinary time with pandemic and economic distress	5/22/2020 2:14 PM
17	I like including a few graphics, but not reading from the power point.	5/22/2020 1:23 PM
18	I had planned to see it but had a last minute repair service person scheduled at that time. Sometimes repair availability takes precedence over pleasure.	5/22/2020 1:10 PM
19	sorry, on a book deadline so busy	5/22/2020 1:03 PM
20	Outstanding, timely and clear presentation. Great Q and A.	5/22/2020 12:44 PM
21	It would have been useful if we would have been able to submit questions for possible selection to the speaker	5/21/2020 3:26 PM
22	made me kinda depressed!	5/21/2020 2:05 PM
23	Had a physical therapy appointment on my computer at same time.	5/21/2020 12:26 PM
24	Format good, questions were good and responses were thoughtful. Good that you managed the session so that everyone was muted.	5/21/2020 10:44 AM
25	Very informative. Good presentation. No technical problems.	5/21/2020 8:35 AM
26	What a wonderful and knowledgeable presenter!	5/21/2020 7:55 AM
27	We had heard wonderful things about Myron Frans by an economist friend of ours, and we were not disappointed! He is a fine speaker - clear, smart, and well informed. Very useful presentation.	5/20/2020 9:33 PM
28	He had excellent slides that helped put across his major points.	5/20/2020 9:16 PM
29	Myron Frans was excellent. I think that the Zoom format is lacking in professionalism, however.	5/20/2020 8:17 PM

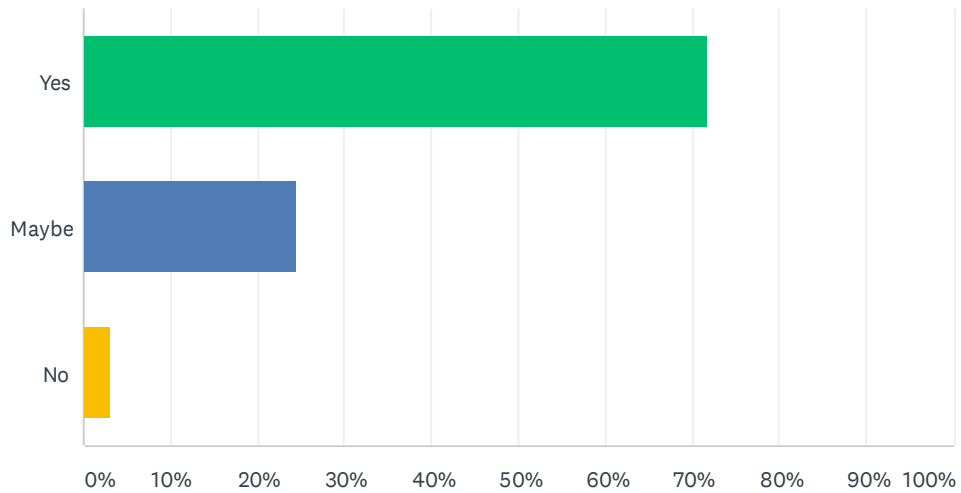
## UMRA Spring 2020 Survey

The image quality for the UMRA President was poor. In my experience Zoom works best in the context of personal communication. It lacks the professional look of CNN, which I think appropriate to a presentation such as this. I've considered offering a memoir workshop for UMRA via remote programming, but don't like the hazy imaging, lack of appropriate lighting and distracting backgrounds that seem to be the norm. I think that UMRA needs better IT help on this in order to be successful. Also, it was not clear to me, as a newcomer to this venue, whether or not I could be seen. When I participate in personal Zoom meetings, I know if my image can be viewed by the speaker(s) in question. If UMRA wants to use Zoom, it needs to make instruction more available both for speakers and for participants.

30	Bill did an excellent job facilitating the event. I especially thought it was a good match to use the Q&A feature for questions in this context rather than open mics; it helped a time-limited presentation move along without interruptions, but also allowed for questions. Myron's presentation was compelling and well-suited for Zoom, and he was obviously comfortable in that format.	5/20/2020 5:48 PM
31	Not much was new to me, but he has a pleasant personality, so high grade for that.	5/20/2020 5:05 PM
32	Not only was the presentation good, but the logistics worked out very well, especially considering that it's the first try at a speaker on Zoom.	5/20/2020 5:04 PM
33	Actually excellent but Myron's sound was too low.	5/20/2020 4:48 PM
34	My husband said it was excellent - I had a zoom conflict so couldn't attend.	5/20/2020 4:18 PM
35	Clear and current information, with a clear recognition of his audience.	5/20/2020 3:18 PM
36	Excellent introduction by President Gabel. Frans did a great job of describing current situation and contributions by U of M and future budget scenarios.	5/20/2020 3:15 PM
37	He shared a lot of information, but also raised questions.	5/20/2020 2:57 PM
38	There were not any surprises. We're in trouble as a state, but luckily we have a rainy day fund	5/20/2020 2:54 PM
39	Audio at times lacked adequate clarity and volume	5/20/2020 2:50 PM
40	He gave a good overview of the work of his office and its connection to the U. of M.	5/20/2020 2:43 PM
41	got busy with other stuff	5/20/2020 2:40 PM

### Q3 Until we can again meet in person, would you be interested in attending additional UMRA Forum webinars?

Answered: 163 Skipped: 0



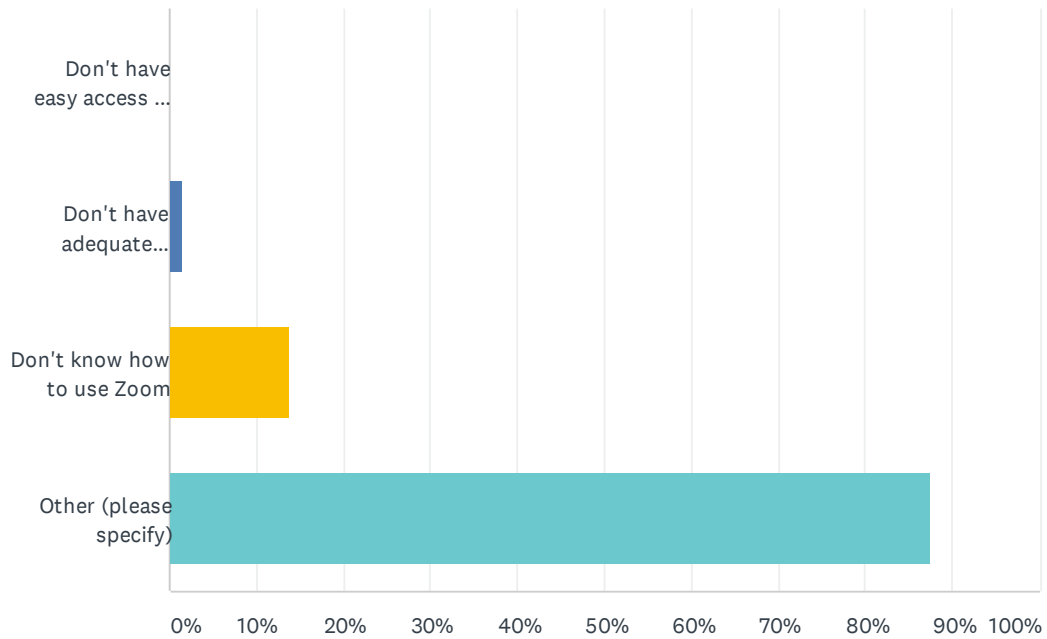
ANSWER CHOICES	RESPONSES	
Yes	71.78%	117
Maybe	24.54%	40
No	3.07%	5
TOTAL		163

UMRA Spring 2020 Survey

#	COMMENT:	DATE
1	I's located in TX	5/27/2020 5:02 PM
2	Easy. Convenient. No parking issues to contend with !	5/27/2020 4:15 PM
3	Depends on topic and how secure the platform for the presentation is.	5/25/2020 11:04 AM
4	be nice if all talks can be archived for other times	5/23/2020 8:50 PM
5	Depends on the topic	5/23/2020 9:52 AM
6	I prefer Zoom webinars to in-person meetings.	5/22/2020 5:55 PM
7	It would depend on the subject matter.	5/22/2020 2:18 PM
8	Much will depend on the topic and also on how other events play out on campus in coming months.	5/21/2020 9:03 PM
9	So helpful to keep connections going, even if minimal and at a distance.	5/21/2020 7:55 AM
10	Although I miss socializing, this is very convenient.	5/20/2020 6:56 PM
11	Definitely. I also think it would be good to add to the online format the Living Well sessions. I think both would lend themselves well to the online format, and would suggest in the wellness one perhaps the option of having open mics for participants so after a brief speaker presentation on a practical topic people could voice questions and comments. A more interactive approach could be a good fit for that session. I believe Zoom has a virtual hand-raising feature that allows people to indicate they'd like to ask a question.	5/20/2020 5:48 PM
12	good way to keep our organization alive and to see someone we never see.	5/20/2020 5:05 PM
13	Suggestion: Publicize as far in advance as possible so folks can reserve it on their calendars, just as with the traditional luncheons	5/20/2020 5:04 PM
14	Depends on topic	5/20/2020 4:36 PM
15	Once a month during the summer--especially if it is at noon time. Would prefer 11a.m. or 1:30 p.m. Twice a month during fall, winter, spring.	5/20/2020 3:15 PM
16	Na	5/20/2020 2:57 PM

## Q4 What obstacles, if any, do you face in attending future UMRA online events (Check all that apply)

Answered: 72 Skipped: 91



ANSWER CHOICES	RESPONSES	
Don't have easy access to a computer/phone/tablet	0.00%	0
Don't have adequate computer broadband connection	1.39%	1
Don't know how to use Zoom	13.89%	10
Other (please specify)	87.50%	63
Total Respondents: 72		

UMRA Spring 2020 Survey

#	OTHER (PLEASE SPECIFY)	DATE
1	None	5/29/2020 9:32 AM
2	only obstacle would be a conflict with another Zoom session I'm signed up for.	5/28/2020 10:27 PM
3	None	5/28/2020 8:43 AM
4	Time to watch is limited .	5/27/2020 8:00 PM
5	Doing contract work, lots of Zoom mtgs, conflicts	5/27/2020 5:12 PM
6	In TX	5/27/2020 5:02 PM
7	I am surprisingly busy (!) but like enjoy opportunities to hear speakers of UMRA's caliber.	5/27/2020 4:40 PM
8	depends on time scheduled	5/27/2020 3:28 PM
9	timing of when it is	5/27/2020 3:16 PM
10	Given the condition of our world and economy I have less interest in what's happening at UMRA	5/27/2020 2:51 PM
11	None! Other than timing.	5/26/2020 9:49 AM
12	No obstacles.	5/25/2020 5:37 PM
13	Good to go for me	5/25/2020 1:30 PM
14	As stated above, main issues are cyber security and topic.	5/25/2020 11:04 AM
15	too many webinars going on, you have no idea....	5/23/2020 8:50 PM
16	Timing conflict	5/23/2020 10:51 AM
17	No problem	5/23/2020 9:02 AM
18	None	5/22/2020 8:53 PM
19	No obstacles at present time, just need to hold the date and time on calendar ahead of time.	5/22/2020 6:41 PM
20	Nature of presentations and adaptation to online presentation	5/22/2020 5:02 PM
21	No obstacles	5/22/2020 4:38 PM
22	None. Really	5/22/2020 2:46 PM
23	None	5/22/2020 2:18 PM
24	At times, computer does not function correctly.	5/22/2020 1:46 PM
25	Busy even in isolation.	5/22/2020 1:33 PM
26	The incentive to attend - the social part - is missing.	5/22/2020 1:32 PM
27	It worked OK	5/22/2020 1:18 PM
28	There are no obstacles for me.	5/22/2020 1:10 PM
29	I had some difficulty connecting because main browser is Safari. Eventually connected with Chrome, but missed President's introduction.	5/22/2020 1:09 PM
30	busy writing; it will get done and then I want to come regualry again.	5/22/2020 1:03 PM
31	I didn't remember so didn't access.	5/22/2020 12:51 PM
32	None	5/22/2020 12:44 PM
33	No obstacles	5/22/2020 12:41 PM
34	None	5/22/2020 12:31 PM
35	No obstacles per se but miss the human interaction	5/22/2020 11:10 AM
36	No obstacles	5/22/2020 10:39 AM

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37	None	5/21/2020 9:03 PM
38	No obstacles	5/21/2020 5:29 PM
39	Not a problem to access.	5/21/2020 4:11 PM
40	No problem	5/21/2020 3:26 PM
41	Lots of other things to do	5/21/2020 1:54 PM
42	I know how to use ZOOM in only the most elementary and passive way.	5/21/2020 12:41 PM
43	Don't have Zoom.	5/21/2020 8:53 AM
44	no problems here	5/20/2020 9:33 PM
45	None except time conflicts.	5/20/2020 9:16 PM
46	None	5/20/2020 9:01 PM
47	N/A	5/20/2020 8:17 PM
48	none	5/20/2020 6:56 PM
49	none. i have done many zooms.	5/20/2020 5:05 PM
50	No obstacles	5/20/2020 5:04 PM
51	would appreciate a reminder the day of the online event	5/20/2020 4:20 PM
52	I have a yoga class at 12	5/20/2020 4:18 PM
53	computer fatigue; ZOOM overload	5/20/2020 4:11 PM
54	no obstacles	5/20/2020 4:11 PM
55	No problems with this	5/20/2020 4:05 PM
56	no obstacles.	5/20/2020 4:01 PM
57	I don't have any obstacles. I use Zoom on my pc multiple times per week for professional and personal purposes, even my yoga class.	5/20/2020 3:38 PM
58	Lots of current projects	5/20/2020 3:29 PM
59	no obstacles	5/20/2020 3:15 PM
60	No obstacles	5/20/2020 3:04 PM
61	Prefer a 11 a.m. webinar, if possible, rather than during the lunch hour.	5/20/2020 2:58 PM
62	you need to have a None checkbox	5/20/2020 2:54 PM
63	get busy with other stuff	5/20/2020 2:40 PM



## Q5 Do you have suggestions for future UMRA Forum topics and speakers?

Answered: 60 Skipped: 103

UMRA Spring 2020 Survey

#	RESPONSES	DATE
1	MN commissioner of health Boynton's Director and what is the plan for next fall.	5/28/2020 2:33 PM
2	Racism in Minnesota and what we can do, perhaps a speaker from NAZ. ( Ms. Simons?) Public health representative? Resilience in children ( child development institute)	5/28/2020 8:43 AM
3	Archaeology of Minnesota	5/27/2020 9:29 PM
4	Not at this time.	5/27/2020 5:12 PM
5	Dr. Michael Osterholmm Minnesota's response to Covid-19 & what's ahead Center for Victim's of Torture (www.cvt.org) Speakers & areas of expertise: <a href="https://www.cvt.org/sites/default/files/attachments/u101/downloads/CVT%20Experts%20April%202018.pdf">https://www.cvt.org/sites/default/files/attachments/u101/downloads/CVT%20Experts%20April%202018.pdf</a> Speakers on Minnesota's work on resolving and/or addressing current immigration issues	5/27/2020 4:40 PM
6	No	5/27/2020 4:33 PM
7	It would be great if we could get Mike Osterholm to give us an overview of the COVID pandemic and lessons learned.	5/27/2020 4:15 PM
8	Distance learning and the future of research-driven higher education.	5/27/2020 3:46 PM
9	Pandemic speakers on both the virus, risks, recovery factors Economists both local, regional, national and global Food security —. I'm reading about starving kids Redesigning our society to live in a global pandemic	5/27/2020 2:59 PM
10	Maybe how to help so many people who are ill, or can't pay their rent, or don't have enough to eat...	5/27/2020 2:51 PM
11	Historical presentations on different segments of the UofM: Marching Band; Landscape Arboretum; building of or rebuilding of Northrop or Coffman or any other building on campus; UMRA beginnings; sport mascots on the various campuses; research opportunities	5/26/2020 9:49 AM
12	No. The format worked well. Questions were good; answers were fine.	5/25/2020 5:37 PM
13	As seniors, we need to face more directly issues of mortality, decline, and weakness. Maybe a focus on classic literature that addresses these "human condition" issues would be helpful. Also, we need more information on end-of-life planning, on common good directions, on facing vulnerability ourselves. And how to support those beyond ourselves like elders in homeless shelters (Bowman does NOT have the answers to this; Wilder Homeless Survey participants do).	5/25/2020 11:04 AM
14	Maybe Jerry Hammer, who has managed the Minnesota State Fair for decades. It would be interesting to hear him talk about the highs and lows of his job and maybe some crazy things that have occurred along the way. Plus, how the fair has changed over the years. Since there will be no state fair this year, he would probably have the time to do this.	5/25/2020 8:18 AM
15	How does the University of Minnesota plan to re-open safely and when?	5/24/2020 1:35 PM
16	Is there any important research under development at the University that can be discussed. It doesn't necessarily need to be STEM. When I hosted the Big 10 Chief's Conference in 2011 Mike Osterholm was my keynote speaker, however Professor Chris Uggen Chair of Criminal justice also spoke. He brought along a student who had been in prison for drug offenses. He had done some remarkable research about the reintegration of former prisoners and data on what factors aid in success,	5/24/2020 11:44 AM
17	Will U of MN become less "global" or connected to the rest of the world via students or faculty collaboration with colleagues from other parts of the world? How will less foreign students applications AND enrollment leading to less tuition income impact on U of M quality of education? Meredith McQuaid may be a good speaker on these topics	5/23/2020 8:50 PM
18	I would suggest Brian Burnett to talk about the recent call for a Faculty Senate Meeting to discuss compensation postponement and how that speaks to the financial status of the U-MN System.	5/23/2020 9:52 AM
19	Always enjoy hearing about medical issues especially the COVID-19 as it seems U of M is on cutting edge regarding the virus.	5/22/2020 6:41 PM

## UMRA Spring 2020 Survey

20	It's probably time for topics on 2020 election, stealth decision making during the pandemic on immigration, environment, regulation etc. We may well awake after the pandemic to a whole new set of repressive institutions and policies. Also Trump foreign policy topics are screening for attention.	5/22/2020 3:11 PM
21	Perhaps a session on retirement plan transfer from Securian to Fidelity. By the fall transfer should be completed, so a session could focus on questions, comments, related to tje transfer. In the fall, the election will be in full bloom, a session on tjhe election would be interesting. Also, session on UM budget given the pandemic, etc.	5/22/2020 2:46 PM
22	Items related to the Pandemic, e.g., vaccines and treatments. Discussion by one or two leading University colleges on how they see the future of their educational offerings and research activities. A high level expert on the economic future as it relates to investments (maybe even a Fed Reseve person).	5/22/2020 2:29 PM
23	I realize that the majority of us are former faculty members, but would enjoy forums relating to current day issues, both nationally and internationally. These would relate more to the varied interests of our membership.	5/22/2020 2:18 PM
24	Faculty presentations on their current research; presentation on UMN capital projects: Pillsbury, Chemistry labs, ...	5/22/2020 2:14 PM
25	Larry Jacobs Julie Schumacher Michael Osterholm	5/22/2020 1:47 PM
26	I have mentioned Dr. Sam Myers, Public Affairs several times.	5/22/2020 1:46 PM
27	Investments during/after the fall, and changes related to the Securian/Fidelity change.	5/22/2020 1:32 PM
28	-Dr. Jan Malcom - Mn Dept. of Health -Someone from MINNESOTA COUNCIL OF FOUNDATIONS <a href="https://mcf.org/disaster-philanthropy">https://mcf.org/disaster-philanthropy</a> -Someone from CLINICAL AFFAIRS UMN. EDU Our portfolio of CO:VID (Collaborative Outcomes: Visionary Innovation & Discovery) grants support COVID-19 research and clinical projects. <a href="https://clinicalaffairs.umn.edu/umn-covid-19-research">https://clinicalaffairs.umn.edu/umn-covid-19-research</a>	5/22/2020 1:23 PM
29	Climate Change and Mn's Environment: Lee Frelich; Peter Reich; Deb Swackhamer Education and Jobs in the Smart Machine Age: David Laporte	5/22/2020 12:44 PM
30	I would like to know about research projects being conducted by faculty collegiate units such as: Biological Sciences College of Agriculture College of Education (EPSY, Child Development, C&I, Comparative International Development and Education) CLA Economics Carlson School of Management Medical School UMRA members representing these colleges could be contacted for speakers as well as deans, dept. chairs	5/21/2020 11:41 PM
31	Susan Jones from History of Science - writing a book on a pandemic in the early 20th century.	5/21/2020 9:03 PM
32	Yes; Matt Guttman" new issues on beneficiaries designations Todd Koch " issues re; income tax planning. Below is a way too detailed outlet of the about topics:Beneficiary considerations Matt co-host and then Tax issues; Beneficiary considerations: 1.Considerations in establishing/renewing benefits designations at Fidelity( Is now necessary with the transfer of account management from Securian to Fidelity) 2.Basic- All beneficiary designations avoid probate and wills 3. Why Charitable Beneficiaries should not be on Roth accounts 4. Why living Trusts can standardize complex beneficiaries with the Trust as beneficiary on all accounts and avoid probate for real estate in other states, etc 5. How the new Federal law effects required distribution for beneficiaries like only a 10 years mandatory distribution, and other issues. Tax Planning Considerations: Maybe Todd could co-host ? <a href="https://www.irs.gov/coronavirus">https://www.irs.gov/coronavirus</a> Much of the following Tax information is from LifeStyle Tax & Accounting Services, <a href="mailto:bruce@lifestyletaxes.com">bruce@lifestyletaxes.com</a> Copyright © 2020. 1.Most must have filed taxes to get federal payouts like \$1,200 and tax credits don't help if there are no profits, and other system barriers. Single adults with income of \$75,000 or less get the full \$1,200. The \$1,200 payment is reduced by \$5 for every \$100 in income above \$75,000. Full income phaseout is \$99,000. Married couples with income of \$150,000 or less get the full amount of \$2,400. The payment is reduced by \$5 for every \$100, making the full payment phased out at \$198,000. Are the payments taxable? No. These payments are not taxable. Head of Household adults (normally single adults with children or other dependents) will receive the full \$1,200 payment if they earn less than \$112,500. Reduced amounts will go out to Head of Household adults who earn up to \$136,500 Consider removing a dependent Stimulus payments help most families with kids, except if they are over age 16. By removing them as a dependent and them filing their own tax return, they may be eligible for a \$1,200 stimulus payment from the federal government. he	5/21/2020 3:33 PM

## UMRA Spring 2020 Survey

Problem The payments are being made based on 2019 or 2018 tax returns. If you do not need to file a tax return, you run the risk of not receiving this payment. Additionally, getting payments out to everyone is technically complex. The IRS must look at both 2019 tax returns and 2018 tax returns, PLUS they are directed by Congress to match these files against two years of Social Security filings for seniors. Not an easy task! The Solution The IRS worked to launch a way to register to receive your payment and to determine the status of your payment. You can find the sites here: For non-filers: Submit information to receive an Economic Impact Payment Payment status and direct deposit registration: There is also an IRS provided Get Your Payment tool to register to receive your payment via direct deposit. It can be found here: Get My Payment Tool This tool will also be used to review the status of your payment. Who should use If you fall into one of these cases, you need to review whether it makes sense to use these tools. Not required to file. If you have not filed a tax return in either 2018 or 2019, using the non-filer tool or other tax filings methods is the only way to receive the payment. College students. If you are not a dependent on someone else's tax return, you need to look into using the non-filer tool. If you are a dependent, it may also be worth a conversation to see if you can or should change your filing status in 2019 in order to receive this payment. Non-filer. Even if you know you need to file a tax return, but have not yet done so, consider using the tool. You will still need to file a tax return, but in the meantime, you can receive your payment. Seniors. Seniors that do not file tax returns in 2018 or 2019 will eventually receive the payment based upon their form 1099-SA or railroad retirement information. The non-filer site asks you not to register, but you may receive the payment sooner AND protect your identity from would be thieves by filing a tax return. To check on status or speed things up. Want faster payment? Payment not yet received? Use the Get My Payment tool to help understand the status of your payment. The Economic Impact Payments are now officially being sent out, so the sooner you let the IRS know that your payment should be included, the sooner your payment will arrive. 2. Many will want to stop current distributions and save a charitable distributions for 2021. ( RMDs have been suspended for 2020. If you choose not to take a distribution, you will not utilize the Qualified Charitable Distribution. If you claim the standard deduction for federal, you may not receive federal tax benefit for 2020 contributions (dependent upon the amount of your contributions and other itemized deductions). For that reason, some taxpayers may postpone charitable contributions to 2021.) So manage the level of Funds in Retirement accounts on Dec. 31, 2020 3. Look into Roth rollovers If you have high balances in tax-deferred retirement accounts, consider rolling them into tax-free Roth accounts. Since you have to pay tax on the funds you convert, the lower value of the accounts means less tax is due. Plus if your income is lower, the tax hit will also be lower. The good news here is that growth in these funds when the economy recovers will now be tax-free! 4. Leverage penalty-free withdrawals You can now take up to \$100,000 out of a retirement account and avoid the 10% early withdrawal penalty. Even better, the income tax on these withdrawals can be paid over three years and you can always repay the money over that same time period. There may be planning opportunities around this added flexibility, but only if you review your options and correctly use the funds. It is more important than ever to keep up with rule changes and be on the lookout for tax planning opportunities. Call if you wish to discuss your options. 5. Capture capital losses, then reinvest Have a stock you like long-term, but it took a hit? Consider selling it, then repurchasing after 30 days. This will avoid the wash sale rules in the tax code. This technique can lower your cost and it can also be used to offset other investments you sell at a gain. 6. Time to buy or sell? The value of real property of all kinds will be moving. Some will move up, some down. So now is a time to think about buying or selling. If you currently own property, don't forget to look into the like-kind exchange rules to help defer any tax bite!

33	Form a committee to consider possible alternatives	5/21/2020 3:26 PM
34	Discussions about future of higher education as we knew it, due to pandemic and rising cost concerns...	5/21/2020 2:05 PM
35	A professor from one of the arts.	5/21/2020 12:26 PM
36	Al Franken	5/21/2020 12:02 PM
37	I think many of the UMRA luncheon speakers would be suitable for Zoom presentations. You might find a large audience of new attendees who for whatever reason are not able to attend in person. Showing slides might be an issue, but I assume it could be addressed.	5/21/2020 10:44 AM
38	Presentation by President Gable on how the UM will operate come fall. Presentation by Marc Jenkins on his current research and his election into the National Academy of Sciences.	5/21/2020 8:35 AM
39	Anything related to the novel coronavirus and/or the University's future owing to it Anything completely unrelated to the novel coronavirus and/or the University's future owing to it--	5/21/2020 7:55 AM

## UMRA Spring 2020 Survey

	interesting research our faculty are doing	
40	Always interested in hearing about how the University is going to go about re-opening and coming back.	5/21/2020 6:28 AM
41	Wellbeing	5/20/2020 10:30 PM
42	Neel Kashkari Michael Osterholm	5/20/2020 9:01 PM
43	Workshops, panel discussions, presentations by faculty and retired faculty on various subjects that add meaning to our lives such as history, philosophy, art, literature, sociology, etc.– tapping the impressive resources of the U of MN. Topics related to aging and even death and dying would also be interesting.(I am reminded of Professor Bob Fultons groundbreaking course many decades ago) Ron Anderson's work on measuring suffering is another fascinating subject.Perhaps someone from the Program in Human Sexuality would present on sexuality and aging or someone from the Center for Spirituality and Healing could speak on how this applies to senior citizens.	5/20/2020 9:00 PM
44	Sorry...no suggestions at this time.	5/20/2020 6:56 PM
45	Joan Gabel, President of UMN. I prefer to have that be ONLY a Q&A session than a summary of what most of us have read in the newspaper. One q I have is, why only a 10% cut in her salary of over \$6xx,000? That's symbolic rather than a pinch in her pocket book. I know she's working hard but so is everyone in one way or another, and many others are hanging on wi fingernails. So "hard work" is not an acceptable reason for a symbolic salary reduction for her and all administrators. Another q, is: is she looking to create efficiencies in the U, now that there is an alternative to SOME brick and mortar old style education systems, with zoom and FT. What efficiencies is she considering, and what are being proposed by faculty and staff? Another suggestion for UMRA is a panel of faculty at each level: contract instructors, untenured Asst Prof., Assoc. Prof. and full Prof. about what their professional life has become now. We may need to split this into 2 sessions: adjuncts + untenured Asst. Profs. on one panel, the other two types on another panel. 2 different days. No star, well paid instructors on the panel please. They may be doing very well.	5/20/2020 5:05 PM
46	- Something on what the post-COVID world might look like - Something on COVID's impact on inequality - Something on climate change, focusing especially on political economy	5/20/2020 5:04 PM
47	Election Preview Mike Osterholm How University is handling Covid	5/20/2020 4:48 PM
48	President Gabel to talk about how the University is managing these days and what plans are for the next 12-18 months U of M researchers to talk about their current work on COVID19 Mayor of Mpls to talk about how the pandemic is changing city planning and priorities. The 2040 plan emphasized density, mass transit, and reducing car traffic. Now, high density and not having your own car seem like huge risk factors. How do we balance? Can zoning & city regulations change to allow more social distancing -- e.g., food trucks in city parks, smaller farmers markets, pop-up concerts in local outdoor spaces. Urban planning / design person(s) to talk about how stores, restaurants, pharmacies, and other businesses will look different in the future. (E.g., will all restaurants plan for more take-out orders; will Target move the pharmacy so you do not have to go through the entire store to get one necessary item; will there be more direct from producer to consumer shipments of goods? What businesses are likely to succeed / fail?) Historian to talk about the 1918 pandemic Expert to talk about supply chains in the U.S.	5/20/2020 4:11 PM
49	Mike Osterholm	5/20/2020 4:01 PM
50	Someone (or two people) from SoPH and/or Medical School who could give a high level presentation about steps that must be taken to develop and adequately test a new vaccine for COVID-19 (e.g., roles of FDA, NIH, clinical trial phases, monitoring for and reporting adverse events, carefully measuring for side effects). We hear a lot of short interviews with experts about vaccine development on the news but a more in-depth presentation with Q & As would be interesting.	5/20/2020 3:38 PM
51	John Sullivan on political psychology	5/20/2020 3:29 PM
52	No suggestions	5/20/2020 3:04 PM
53	great format, great presentation - and excellent way to provide content that feels "intimate" and that doesn't require driving, parking, or getting dressed for that matter!	5/20/2020 2:58 PM
54	I would be interested in learning about any Initiatives the U is planning for creating greater	5/20/2020 2:58 PM

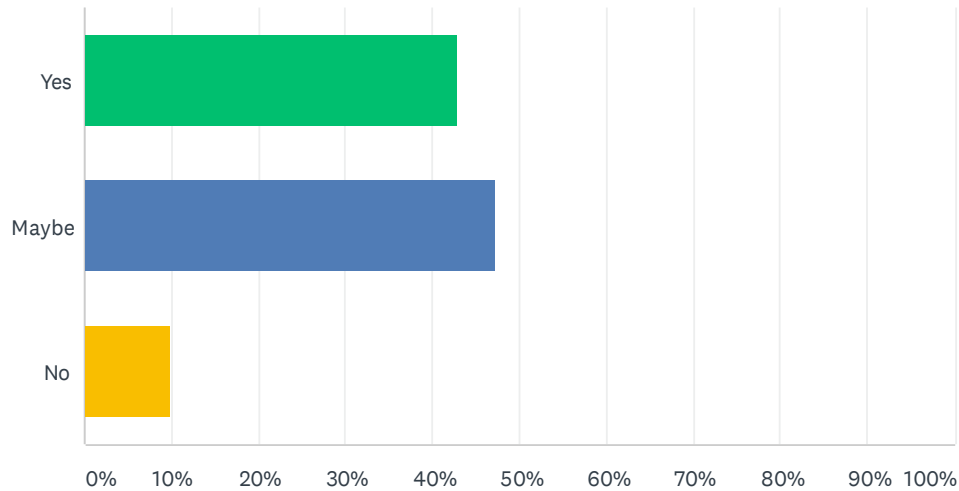
## UMRA Spring 2020 Survey

resilience and sustainability, given the possibility of an ongoing weaker economy, declining natural resources (especially energy), local and regional food production, a shrinking dependence on globalism, and accumulating effects of climate change. Will the U continue pursuing a course aligned with the current worldwide neoliberal paradigm, or lead in creating a new common-good paradigm that focuses on providing all citizens--and all living things-- with the essential resources needed for living a healthy, productive existence? In light of such concerns, what curriculum developments might be in the works that will help prepare students for facing potentially severe challenges ahead? Thanks

55	Athletics director; whomever is running the COVID testing facility	5/20/2020 2:57 PM
56	What is AI and neural networks, and how is it already changing your life How to use chat, Q&A, share screen, and other features What research is going on at the U? (Biology, covid-19, chronobiology, recombinant DNA, etc.)	5/20/2020 2:54 PM
57	A presentation on current UM strategies, possibilities and obstacles in researching Covid treatment and vaccines.	5/20/2020 2:50 PM
58	I'm glad the next one will have a speaker on health issues.	5/20/2020 2:43 PM
59	Something, anything, NOT related to COVID-19.	5/20/2020 2:36 PM
60	No. Since I'm retired, day-to-day decisions by the University do not affect me. I'm interested, but I'm not sure that I have a lot of time to devote.	5/20/2020 2:22 PM

Q6 Our monthly programs have also included "Living Well" workshops that focuses on personal well-being. Would you be interested in attending these workshops if they were presented online?

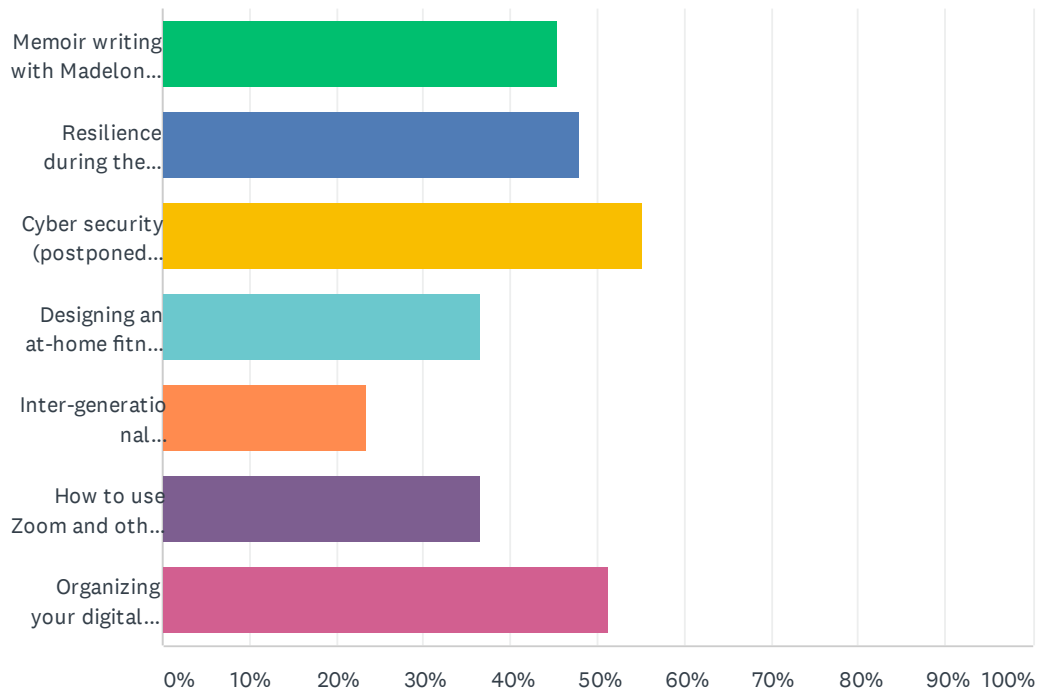
Answered: 163 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	42.94%	70
Maybe	47.24%	77
No	9.82%	16
TOTAL		163

## Q7 Would you be interested in the following workshop topics? (Check those that you think you would likely attend)

Answered: 150 Skipped: 13



ANSWER CHOICES	RESPONSES	
Memoir writing with Madelon Springnether (postponed earlier)	45.33%	68
Resilience during the pandemic with Ted Bowman (previous speaker)	48.00%	72
Cyber security (postponed earlier)	55.33%	83
Designing an at-home fitness program	36.67%	55
Inter-generational communication	23.33%	35
How to use Zoom and other video conference software	36.67%	55
Organizing your digital photos	51.33%	77
Total Respondents: 150		



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#	OTHER TOPICS THAT INTEREST YOU?	DATE
1	Analysis of various volunteer opportunities Zoom meetings with researchers in the Covid-19 team at the U of MN including Dean Tolar	5/29/2020 9:32 AM
2	history, international relations, domestic terrorism & growth of hate groups, journalism vs. disinformation	5/27/2020 4:40 PM
3	None	5/27/2020 4:33 PM
4	All look interesting	5/25/2020 1:30 PM
5	See above. If the memoir writing could also focus on writing ethical wills, that could be useful. Cybersecurity is an important topic, but many find it difficult to create their own secure networks regardless of what is suggested. ZOOM especially has huge transparency and security issues, and, since seniors are often targeted opens the door for the huge fraud industry. Check with AARP Fraud Alerts for seniors. End-of-life discussions with children are very difficult--we need lots of help on this front.	5/25/2020 11:04 AM
6	Something from the Vet school. I've always been impressed with the VMC. We started taking our pets there last year. The faculty are spectacular, but so are the students, This year 90% of vet students are female. It is a teaching hospital so an appointment takes time, but the care is more than thorough.	5/24/2020 11:44 AM
7	See above	5/23/2020 9:52 AM
8	1) I am interested in purchasing immediate annuities, but I have absolutely no knowledge about it. Some guidance /information would be helpful. 2) How to maximize retirement savings? 3) Medicare - I understand that this topic was covered in the past. (I was not able to attend it. I am not sure whether its recording is available.)	5/22/2020 5:55 PM
9	I would like to hear from Steve Miles or other experts on the unfolding situation.	5/22/2020 4:01 PM
10	Organizing other files on your computer, not just photos.	5/22/2020 3:48 PM
11	See above. Political scientists, historians, economists, sociologists might be under-represented lately.	5/22/2020 3:11 PM
12	See my suggestions above	5/22/2020 2:46 PM
13	Repeat of workshops on: when to move out of your home? What options for senior living? and how to downsize--who gets grandmother's pie plate?	5/22/2020 2:14 PM
14	Take us out to the Ballgame: History, Statistics, Cheating, Importance	5/22/2020 1:47 PM
15	Ted Bowman is great.	5/22/2020 1:10 PM
16	Downsizing, local travel	5/22/2020 11:10 AM
17	Gopher talks by: Gopher coaches such as PJ Fleck and Lindsay Whalen	5/21/2020 11:41 PM
18	Environment, climate, key aspects from world history	5/21/2020 3:26 PM
19	safe travel options during and post pandemic...	5/21/2020 2:05 PM
20	All these topics are self-centered - I'd rather hear about outward-centered things. Maybe presentations by the inventors of the new COVID-19 innovations. Or maybe other new things happening at the U	5/21/2020 1:54 PM
21	Someone from the Raptor Center? The future of higher education given the move to on-line instruction The digital divide	5/21/2020 7:55 AM
22	Online Library resources	5/20/2020 9:01 PM
23	See above, No. 5	5/20/2020 9:00 PM
24	Responses to the pandemic	5/20/2020 7:08 PM
25	Ageism and COVID-19. Some interesting pieces out there on this include <a href="https://academic.oup.com/ageing/advance-article/doi/10.1093/ageing/afaa097/5831206">https://academic.oup.com/ageing/advance-article/doi/10.1093/ageing/afaa097/5831206</a> and <a href="https://www.apa.org/topics/covid-19/ageism">https://www.apa.org/topics/covid-19/ageism</a> . I thought that some of the statements by V.V. Chari in the last UMRA newsletter were ageist and troubling (e.g., "The population most at risk	5/20/2020 5:48 PM

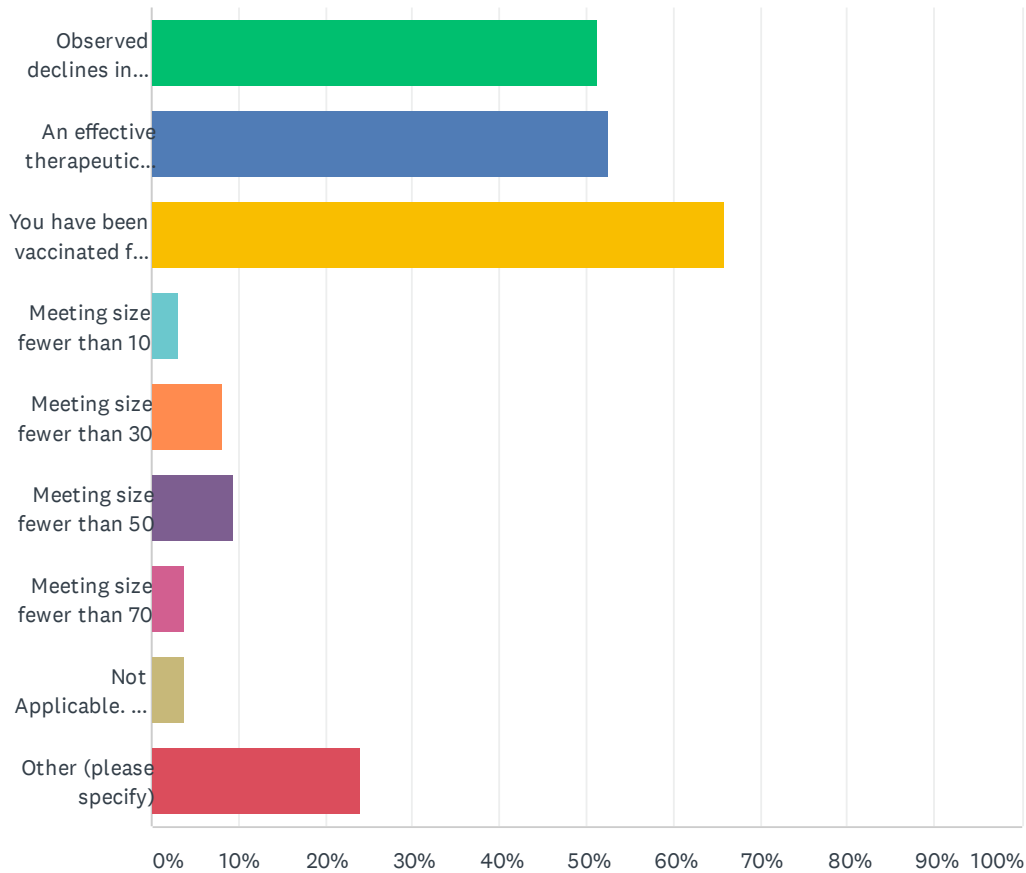
## UMRA Spring 2020 Survey

consists of old people, especially those with other comorbidities. The political system clearly puts a huge weight on saving older people, who, as always, seem to exercise disproportionate political power. Biggest losers: It is worth asking every grandparent how much additional risk they are willing to take to ensure a better life for their grandchildren. Let us make no mistake in understanding that the biggest losers from current policies are the bright 18-year-olds whose lives will be ruined if we enter into another Great Depression. Where are the grandparents willing to ask the political system to change its policies?" I think there's a need for a more informed discussion that values the demographic that makes up the UMRA membership, especially as we move into a time when those of us with "underlying health conditions" and "of a certain age" who heed the epidemiologists may come to be viewed as outliers in society as we continue to mask and avoid the malls and bars that others are starting to flock to. Just a thought.

26	How to prepare our body for th best survival outcome if we get covid-19, even if we are doing the right protections now? Most of the deaths have been in congregate places: LTC homes, meat processing plants, etc. Does that reduce our risk a little in other environments? Basically, I think we should have speakers tell us things that have had little to no discussion in the media.	5/20/2020 5:05 PM
27	Financial markets Aging in Place options	5/20/2020 4:14 PM
28	(1) tele-medicine trends; when and how to use tele-medicine (2) avoiding COVID19 scams (3) ideas for ways to have a meaningful memorial / celebration of life when people cannot gather in person A website commemorating a person who has passed, with places for people to add their comments. Some templates to help with planning & writing? Examples of such things?	5/20/2020 4:11 PM
29	Coping mechanisms for the future.	5/20/2020 4:01 PM
30	All the topics are interesting, but the ones I have checked would probably include more new information for me and my husband, who is also a member of UMRA.	5/20/2020 3:38 PM
31	I could have used the memoir writing instruction before I finished a 750-page life chronicle-memoir in December. Overall, I found it was a very worthwhile endeavor. I have plenty of exercises I use daily, but I'm glad to see a fitness offering suggested.	5/20/2020 2:58 PM
32	Will you allow interrraction? Meeting rooms?	5/20/2020 2:54 PM

### Q8 Under what conditions would you attend UMRA in-person monthly luncheons? (Check all that you would consider necessary before you would return)

Answered: 158 Skipped: 5



ANSWER CHOICES	RESPONSES	
Observed declines in Covid-19 cases and deaths	51.27%	81
An effective therapeutic drug is available for Covid-19	52.53%	83
You have been vaccinated for Covid-19	65.82%	104
Meeting size fewer than 10	3.16%	5
Meeting size fewer than 30	8.23%	13
Meeting size fewer than 50	9.49%	15
Meeting size fewer than 70	3.80%	6
Not Applicable. Not able or not interested in attending in-person luncheons for other reasons	3.80%	6
Other (please specify)	24.05%	38
Total Respondents: 158		

UMRA Spring 2020 Survey

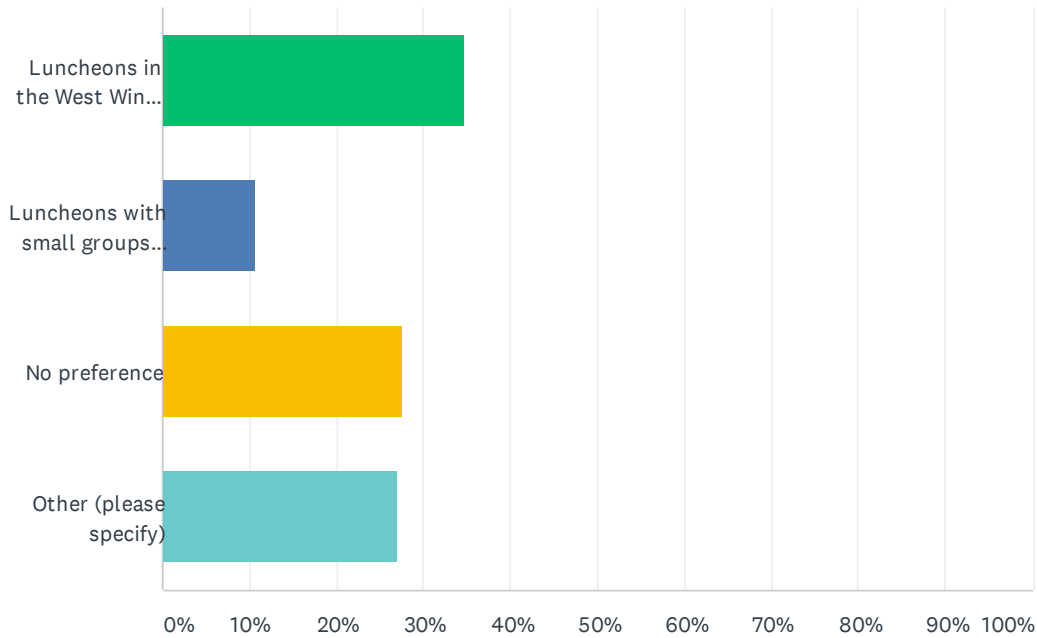
#	OTHER (PLEASE SPECIFY)	DATE
1	Take out with Zoom	5/28/2020 2:33 PM
2	I'm ready any time!	5/28/2020 8:43 AM
3	Not sure	5/27/2020 8:43 PM
4	So many variables. From right now, it seems remote.	5/27/2020 5:12 PM
5	I'm located in TX	5/27/2020 5:02 PM
6	My husband and I survived coronavirus after returning from 12 days in Italy in March. In our experience, the virus requires at least four-six weeks of down time and recovery, even if you have "mild" symptoms that don't require hospitalization. Even though I may be immune, I am in no hurry to be in big crowds anywhere. People are too negligent, seldom able to be careful enough to observe safety protocols.	5/27/2020 4:40 PM
7	Adequate social distancing	5/27/2020 3:46 PM
8	# of attendees depends on room size...therefore cannot respond	5/27/2020 2:53 PM
9	Have underlying health issues and need to follow strict guidelines.	5/25/2020 11:04 AM
10	social distancing & face masks	5/25/2020 8:18 AM
11	I would say the meeting size would depend on space. If the Great Hall were available people could really space themselves out.	5/24/2020 11:44 AM
12	and enough space between each other. But if we cannot talk to each other quietly why bother	5/23/2020 8:50 PM
13	Not interestec in attending in person before we have better idea of virus spread	5/22/2020 2:46 PM
14	Apropriate spacimng and PPE protocols	5/22/2020 2:29 PM
15	Interesting topics.	5/22/2020 2:18 PM
16	Governor's guideline indicate it would be OK for retirees to meet in groups.	5/22/2020 1:34 PM
17	I would wait to answer until we know what the UofM policies will be.	5/22/2020 1:23 PM
18	Please keep zooming!	5/22/2020 1:18 PM
19	Not sure.... depends on what is happening with Covid-19.	5/22/2020 1:10 PM
20	No more than four people per table	5/22/2020 1:09 PM
21	cant come until book is done, 10 months?	5/22/2020 1:03 PM
22	Too soon to think about, sorry.	5/22/2020 12:37 PM
23	Campus Club has clear plan for COVID-19 and CDC guidelines	5/21/2020 11:41 PM
24	Still thinking through these issues - those are my current reactions.	5/21/2020 9:03 PM
25	If many others feel safe, we could be convinced it is ok	5/21/2020 3:26 PM
26	Social distancing possible.	5/21/2020 12:41 PM
27	All clear given by Governor or observed conditions	5/21/2020 10:44 AM
28	Not sure. I loved the luncheons, but am nervous about trying anything like it until we really know more about the risks.re	5/20/2020 9:33 PM
29	The effort of attending events at the U (50 mile round trip, the long and circuitous walk from River Rd ramp to campus club, cost of parking) make attending unlikely anyway. Add COVID ....	5/20/2020 9:20 PM
30	Awaiting further guidance from the health authorities	5/20/2020 9:00 PM
31	testing of everyone who comes to a meeting beforehand, and exclusion if the result is positive. Testing and vaccine- cheked above - must be vetted and shown to be highest quality. It is extemely risky otherwise, and zoom meetings are a quite good alternative.	5/20/2020 5:05 PM

## UMRA Spring 2020 Survey

32	Besides being in my 80s, I have an underlying condition, so I have to be exceptionally careful. If the therapeutic drug were EXTREMELY effective I'd probably check that one also	5/20/2020 5:04 PM
33	The first option under 8 is too vague; what one person considers to be adequate "observed declines" could be considerably different from what another person thinks. I would like for the TC metro area to have few or no new observed declines in cases and deaths before going to gatherings indoors with people who are not in my household. Regarding question 9. below: Use West Wing with small tables placed 6 feet apart; persons living in the same household could sit a the same table.	5/20/2020 3:38 PM
34	If the first three are in place, then meeting size is less relevant than being able to do some social distancing so that probably means at the Campus Club meeting fewer than 70 with only 3 per table.	5/20/2020 3:15 PM
35	Spacing is observed. Problem: Hearing well.	5/20/2020 2:58 PM
36	The satisfying part of in-person UMRA luncheons is sitting with people and having the opportunity to chat with them. It's just not feasible to do that until it's safe.	5/20/2020 2:57 PM
37	Once it has been established that the vaccine I received is effective (a year?). Zoom meetings are great until then.	5/20/2020 2:54 PM
38	Too soon to say, and I would base my decision on the advice of my "family" physician (my son).	5/20/2020 2:36 PM

**Q9 We are looking at ways to configure in-person meetings if state and federal guidelines allow us to convene. Which of the following configurations would you prefer for initial meetings.**

Answered: 141 Skipped: 22



ANSWER CHOICES	RESPONSES	
Luncheons in the West Wing or other large room, with extensive cleaning and participants sitting at least six feet apart.	34.75%	49
Luncheons with small groups in separate rooms watching on Zoom, with extensive cleaning and participants sitting at least six feet apart.	10.64%	15
No preference	27.66%	39
Other (please specify)	26.95%	38
<b>TOTAL</b>		<b>141</b>

UMRA Spring 2020 Survey

#	OTHER (PLEASE SPECIFY)	DATE
1	Not coming until vaccinated - and for older people you shouldn't even be considering a meeting until everyone is vaccinated including the younger people on the meeting staff.	5/29/2020 9:32 AM
2	Too soon for me. I like the idea of the webinars - might allow me to attend an interesting topic I wouldn't have time to attend in person even if Covid wasn't an issue.	5/28/2020 10:38 AM
3	Outside in summer and fall.	5/27/2020 9:29 PM
4	In TX	5/27/2020 5:02 PM
5	Please refer to my previous comment.	5/27/2020 4:40 PM
6	Do not know	5/27/2020 2:59 PM
7	Only after vaccination for Covid-19	5/27/2020 2:51 PM
8	No in-person group meetings until a vaccine is available.	5/26/2020 9:49 AM
9	Would prefer to do zoom at home than above options.	5/25/2020 8:47 PM
10	everyone is vaccinated	5/24/2020 1:35 PM
11	See #8 above.	5/24/2020 11:44 AM
12	Food and 6' spacing is problematic	5/23/2020 9:02 AM
13	No luncheon	5/22/2020 8:53 PM
14	unlikely to attend for some time	5/22/2020 4:01 PM
15	Not interested in mtg until virus is under control	5/22/2020 2:46 PM
16	Zoom is OK for now	5/22/2020 1:47 PM
17	I would wait to answer until we know what the UofM policies will be.	5/22/2020 1:23 PM
18	See above.	5/22/2020 1:10 PM
19	No gathering is safe without vaccination	5/22/2020 12:47 PM
20	Any of the above might work, also outdoor seating	5/22/2020 11:10 AM
21	What about both?	5/21/2020 9:03 PM
22	Will not attend until vaccine	5/21/2020 5:29 PM
23	Probably not interested in luncheons at all	5/21/2020 1:54 PM
24	Not sure what kind of lunch would be best or not lunch at all.	5/21/2020 12:26 PM
25	Nope.	5/20/2020 9:20 PM
26	See question 8 answers	5/20/2020 9:01 PM
27	Outdoor meetings with cleaning and distancing	5/20/2020 7:08 PM
28	not interested in doing in-person meetings under prsvent conditions. If we wear masks, which is not a condition listed here but should be, it will limit our ease of conversation in a way that zoom won't.	5/20/2020 5:05 PM
29	I do not think it is wise to be in an indoor space with any size group with recirculated air and any time period more than 10 minutes. I would consider an outdoors space. Otherwise, wait for the vaccine and use Zoom.	5/20/2020 4:48 PM
30	It's too early to answer this question	5/20/2020 4:18 PM
31	I would prefer not to gather until we can gather in a large group. Sitting 6 feet apart or being in separate rooms seems silly; we may as well ZOOM then.	5/20/2020 4:11 PM
32	wait until we have a vaccine. Nothing is gained by rushing this	5/20/2020 3:33 PM
33	Located at a more accessible place, with convenient parking. The U parking options are less	5/20/2020 2:58 PM

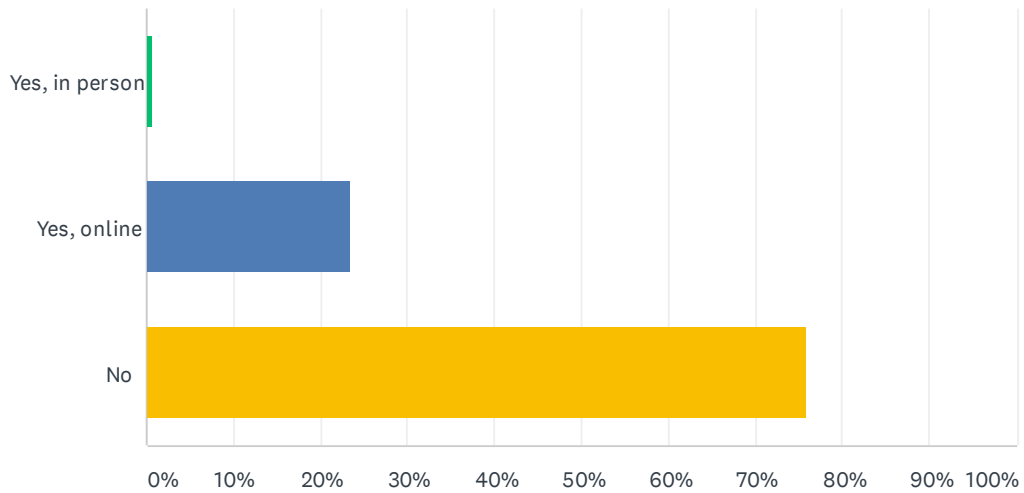
## UMRA Spring 2020 Survey

	than desirable.	
34	Don't rush it.	5/20/2020 2:57 PM
35	Not likely to attend	5/20/2020 2:57 PM
36	none of those -- you cannot wear masks when eating	5/20/2020 2:54 PM
37	I can't imaging meeting for a luncheon and sitting six feet apart in any setting, except perhaps for a BYO picnic lunch outdoors.	5/20/2020 2:36 PM
38	At this point none of the above until vaccine	5/20/2020 2:23 PM



## Q10 Since the COVID-19 Lockdown, have you participated in any meetings of UMRA Committees or Special Interest Groups?

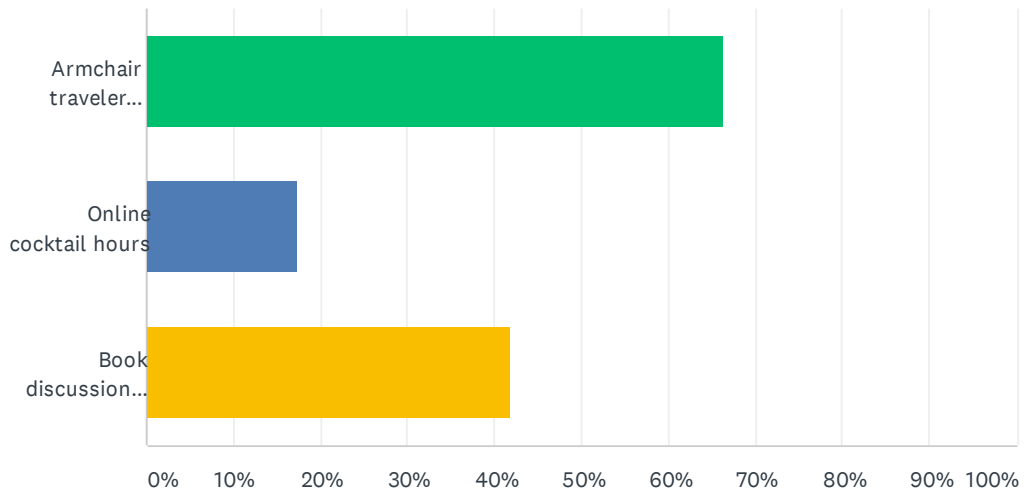
Answered: 158 Skipped: 5



ANSWER CHOICES	RESPONSES	
Yes, in person	0.63%	1
Yes, online	23.42%	37
No	75.95%	120
TOTAL		158

### Q11 Would you be interested in the following UMRA social activities conducted online (Check those that you would most likely attend)

Answered: 110 Skipped: 53



ANSWER CHOICES	RESPONSES	
Armchair traveler presentations	66.36%	73
Online cocktail hours	17.27%	19
Book discussion groups (more groups besides the current Book Club)	41.82%	46
Total Respondents: 110		

UMRA Spring 2020 Survey

#	OTHER SUGGESTIONS OR COMMENTS?	DATE
1	Wine and beer tasting	5/29/2020 9:32 AM
2	We do need more book discussion groups. The original book group was started in 2011. Current membership is 16 persons. This book group meets every month except December. We meet via Zoom during the Coronavirus pandemic.	5/28/2020 10:27 PM
3	Perhaps	5/28/2020 10:38 AM
4	Not right now.	5/27/2020 5:12 PM
5	"The Precipice", by Toby Orb and/or "The Uninhabitable Earth: Life After Warming", by David Wallace-Wells are two of my recommendations for a book discussion group.	5/27/2020 5:02 PM
6	With hospitalization available only to the critically ill, preparing to take care of yourself at home should you contract the coronavirus is important. Those of us who have gone through it may be able to offer some tips in a group discussion. For example, we did not have an oximeter, an essential tool to track your oxygen levels while you are sick. We ordered one online on April 3, about three weeks into our quarantine that was finally delivered to us five weeks later in May. Like thermometers, local vendors were out of stock, as were online places like Amazon. Finally, in early May we were able to order one that was delivered within four days.	5/27/2020 4:40 PM
7	None	5/27/2020 4:33 PM
8	Exotic places. Beautiful photos.	5/27/2020 2:59 PM
9	At this time I'm not interested	5/27/2020 2:51 PM
10	Presentations through You-Tube might allow people to watch with some cybersecurity. If there could be a book club that addresses serious end-of-life issues, it might be worth exploring---but again, cybersecurity is the issue.	5/25/2020 11:04 AM
11	curate other great cultural performance like the Met or live theater, provide members with date, time and links so we can all watch "together". In short a curate virtual cultural program	5/23/2020 8:50 PM
12	None	5/22/2020 2:46 PM
13	Virtual travel tours from Road Scholar to spike our interest for future trips. Walking groups in historic neighborhoods, with a leader, while keeping 6 ft. apart.	5/22/2020 2:18 PM
14	The photo group has been incredible effective and fun.	5/22/2020 1:23 PM
15	the photo club already meets on line. Our presentations could be extended to a larger audience.	5/22/2020 12:47 PM
16	On line research project presentations followed by discussions . The above activities are frequently offered through other organizations to which people belong. How about an online social hour with PJ Fleck, Lindsey Whalen or with deans from various colleges?	5/21/2020 11:41 PM
17	Matt Guttman" new issues on beneficiaries designations Todd Koch " issues re: income tax planning. as outlined above:	5/21/2020 3:33 PM
18	Presentations by UMN researchers. Maybe music.	5/21/2020 1:54 PM
19	I tried an online coffee hour after zoom church, and it worked pretty well. Once everyone showed up, the leader divided us into groups of 4 for some discussion, then we came back together, so everyone got a chance to share stuff.	5/20/2020 9:33 PM
20	I'm continuing my current 2 bookclubs on Zoom, one neighborhood ladies and the other thru the Arboretum. Different from each other but both effective. I'm new to UMRA so have never attended any in person events even before COVID. A book club, and the travel idea—both appeal.	5/20/2020 9:20 PM
21	Not interested in more at this time.	5/20/2020 9:01 PM
22	I don't drink but would be interested in a social hour. Others can drink.	5/20/2020 5:05 PM
23	I'm already in two book groups; that's the only reason I didn't check that one.	5/20/2020 5:04 PM
24	Movie discussion groups	5/20/2020 4:11 PM

## UMRA Spring 2020 Survey

25	It would be nice if these events could be by Zoom and we could occasionally see each other and not just the presenters. (This only works when the group is not too large). Armchair art presentations. Gardening in MN during COVID-19 Health Sciences orchestra playing together via Zoom like they did for graduation last Saturday.	5/20/2020 3:38 PM
26	Zoom meetings make sense, not only during the pandemic but regularly.	5/20/2020 2:58 PM

**Q12** Finally, we would appreciate any additional thoughts you might have about how UMRA can inform and support our members during this time.

Answered: 58 Skipped: 105

## UMRA Spring 2020 Survey

#	RESPONSES	DATE
1	No ideas at present, but thank you and everyone else who have worked so hard and creatively to tailor ways for UMRA to continue in some form for the foreseeable future. Kudos to you all! I look forward to participating in future events.	5/28/2020 7:31 PM
2	Keep us informed about new U policies and how UMRA might help execute them.	5/28/2020 2:33 PM
3	How about having webinars recorded in such a way that we can stream them at our convenience. I have not attended many meetings even though the topics are interesting because it conflicts with something else, we are wintering in AZ or the subject is so popular that reservations are closed before I get to it. (this is my fault I know, but perhaps it would help others too since meeting room size is limited). If they were streamed or available online so could be viewed at the time I was available and from any location I might very well sign in to see them and learn about new topics or topics of interest. It does mean I'd miss the social aspect but at least I could be present from a distance.	5/28/2020 10:38 AM
4	Thanks to all who make this a meaningful membership!	5/28/2020 8:43 AM
5	Clearly the organization is striving to meet our needs.	5/27/2020 9:29 PM
6	I am a new member this year so didn't really establish a connection before COVID-19 emerged. I have been so busy with contract work post-U to this point, working from home, so really I'm still working and not feeling quite ready for UMRA. Nevertheless, I admire everything UMRA does and look forward to the day when circumstances permit. Thank you for persisting with this survey! And thank you to everyone leading the organization.	5/27/2020 5:12 PM
7	Additional On Line offerings would be appropriate at this time as we retired folks are probably facing many months of isolation until this Covid-19 pandemic loosens its grip. Streaming type programs of 3-6 hours in length dealing with one area as art, A I, Corporate Farms, or other topics of interest and availability.	5/27/2020 5:02 PM
8	I am in favor of suspending UMRA's usual large group gatherings until late fall or winter or whenever we can be very sure that the risk for contracting Covid-19 has been eliminated. As an older group that is particularly vulnerable to the virus, why would we take a chance? I think innovative gatherings on Zoom offer viable, creative solutions for the time being.	5/27/2020 4:40 PM
9	Sorry, I don't know how you can do that.	5/27/2020 4:33 PM
10	Meditation sessions, possible bike rides in small groups	5/27/2020 2:53 PM
11	Perhaps trying to support others who have lost family members, friends, jobs during these difficult times.	5/27/2020 2:51 PM
12	For now I am happy with the monthly newsletter and participating via webinar.	5/26/2020 9:49 AM
13	As all retiree members are by definition higher risk for covid-19, I appreciate your efforts to connect while keeping us as safe as possible. Thanks!	5/25/2020 8:47 PM
14	There are so many uncertainties surrounding the trajectory of the spread of COVID19 and the near-term prospects for a vaccine that it's hard to make solid plans. I commend the leadership for what has been done so far. Keep on playing it by ear. So far, so good. JSA	5/25/2020 5:37 PM
15	Looking forward to being able to meet as in the past. Soon, I hope	5/25/2020 1:30 PM
16	We appreciate the email updates with links. UM is again involved with Fidelity and transfer of funds, especially problematic for retirees. The health insurance options need much work and clarification-- UM needs to make sure that the companies will accept the person--prior health conditions may not be covered and you CANNOT go back to original medicare once you are in an advantage plan. This is a big problem---in attending meetings from other providers before the virus (just to compare with what UM offers)--it did seem as if other companies provided more personal support, greater benefits and access to medicines. Going forward, this will be an even bigger issue. We really need strong negotiators for the retirees and clear comparisons of UM plans with others like those from United/AARP or Alina/Aetna. What UM personal support is offered to retirees? What access to Palliative Care doctors? Thanks for all your work with UMRA--it is a time of transition to a younger generation of retirees at the same time as a pandemic; this is a difficult time.	5/25/2020 11:04 AM
17	Information about the financial health of the University at the present moment. Since tuition has	5/24/2020 11:44 AM

## UMRA Spring 2020 Survey

become the primary revenue and fall enrollment sounds decent, the U may be in better shape than the cities losing all manner of taxes except property. Of course state aid to the U almost certainly will decline for a year or two.

18	curate other great museums virtual tours and share that with members.	5/23/2020 8:50 PM
19	I think this is a time for retired faculty and staff to ask U-MN Administrators tough questions. Hopefully, faculty/staff governance will do the same. As you undoubtedly understand, how the institution weathers this problem will likely define operations for a number of years to come and will probably affect the risk profile adopted by deans, department chairs and senior administrators which may affect institutional progress. We also need to make the point, that when times are tough, all program do NOT have to survive.	5/23/2020 9:52 AM
20	I believe you do a fine job now of sending information to us and supporting members given the difficult situation we live in. Thank you!	5/22/2020 6:41 PM
21	Thanks for initiating this. It is good to continue opportunities to participate via zoom.	5/22/2020 4:01 PM
22	Online presentations or workshops are a good alternative for now. Social activities can wait until we are well past any danger.	5/22/2020 3:48 PM
23	I appreciate all the thought and activity being put into this. Thanks for doing it. I would be very nervous about moving forward with in-person activity until the virus contagion has decreased significantly or a therapy or vaccine has been developed. One item I thought about on your list, develop a process to connect with members who maybe have less support and would be interested in check-in by members. Thanks again. John Romano	5/22/2020 2:46 PM
24	Thank you for your work. So pleased with the participation for Myron Frans UMRA Forum	5/22/2020 2:14 PM
25	Thanks for all your thoughts and efforts...	5/22/2020 1:47 PM
26	You are doing a superb job. Continue.	5/22/2020 1:46 PM
27	Maybe the Care Committee could establish a phone tree to make sure that people who have wanted to participate can do it. (Great suggestion for the zoom tutorial session!), Note: The following does not pertain to this question. A question may be added to further surveys to find out how many persons were watching one computer (my spouse and I watched it from one computer, which adds one more person to your audience count).	5/22/2020 1:23 PM
28	I miss in person meetings, but Zoom works for us meanwhile.	5/22/2020 1:18 PM
29	Thank you for doing a great job of communicating to the membership.	5/22/2020 1:10 PM
30	I applaud the informative emails, and would hope they may continue.	5/22/2020 1:09 PM
31	I love UMRA; just can't come right now until book is done.	5/22/2020 1:03 PM
32	Very challenging times for all organizations, I appreciate how well UMRA has adapted so far	5/22/2020 11:10 AM
33	Periodic updates by President Gabel on COVID-19 and implications for U of MN. I don't know if all UMRA members receive her Briefs. I suggest topics or activities that provide synergy . Do we need continued focus on issues related to aging, topics presumably focus on non vital aging etc. etc. What are retirees doing to keep active intellectually, of ways interacting with the community etc.	5/21/2020 11:41 PM
34	Some random observations: 1) Given the overall size of this group, it is not clear just how to parse things so that those who know each other might be part of smaller group get together. Just last night I helped coordinate a farewell event for visiting Fulbrighters in Minnesota with some alums. With about 20 participants that worked very well, but larger might have been a problem. 2) Similarly, if someone were to become ill, that would be useful for those of us who know that individual to learn of that and perhaps send a card (privacy is, I know, an issue) - but notifying everyone is probably not appropriate. 3) If someone is part of the discussions of cut-backs, any changes in our health affiliation or other matters would be important to learn. Thanks for carrying on!	5/21/2020 9:03 PM
35	Provide opportunity's for small groups to form for discussion of issues subject of joint interest	5/21/2020 3:26 PM
36	Keep up the good work — necessary now especially. Thank you.	5/21/2020 12:41 PM
37	Extra articles for the web site with e-mails to inform us that they are there.	5/21/2020 12:26 PM

## UMRA Spring 2020 Survey

38	Keep up the good (important) work!	5/21/2020 12:02 PM
39	I'd like to know what decisions are being made about returning staff to University offices. I'd like to know the plans for fall classes.	5/21/2020 10:44 AM
40	Keep up the creative and energetic efforts to sustain UMRA in these difficult times. We are fortunate to have such good leadership!	5/21/2020 10:24 AM
41	Thank you very much.	5/21/2020 8:35 AM
42	Thanks for asking our opinions. I truly appreciate the hard work the leadership is engaged in.	5/21/2020 7:55 AM
43	Could we be doing well-fare check ins on our members perhaps through a calling tree?	5/21/2020 6:28 AM
44	Thanks for all your good work!	5/20/2020 9:33 PM
45	On the Franz presentation, i had the volume at max on my iPad. In my own house, just me. The normal ambient noise of living made (a leaf blower in a yard 300 feet away, frogs singing in the swamp out back—all my windows closed) it very hard to hear him. Pres. Gable and Bill at end were easier to hear. Platforms we used for Library Assembly in the Mississippi Room allowed communication by remote participants, say in Wilson Library, to notify a tech person in Miss. room who could have respond and changed mic settings at the meeting. (Sorry I dont remember what we were using, but it was a platform in use by the entire U—2-3 years ago.)	5/20/2020 9:20 PM
46	It would be useful to hear any useful info, other than what is available in the news, wrt having a case and treatment, and what recovery has been like after discharge from the hospital. It would be good to hear about any research news other than what a journalist reports as second hand info. For example, is hydroxychloroquine being used on patients automatically, or does a patient have the right to refuse it?	5/20/2020 5:05 PM
47	Newsletter is excellent; keep it up.	5/20/2020 5:04 PM
48	List of volunteer activities that UMRA members can do safely from home. How might the special talents and skills of members be put to use? Thank you.	5/20/2020 4:11 PM
49	I am pleased that UMRA has so quickly set up video meetings/presentations-miss the lunches but video works well in the meantime.	5/20/2020 4:05 PM
50	Newsy emails about how the staff, faculty,, students, and alumni are managing.	5/20/2020 4:01 PM
51	The newsletter at least once a month is helpful.	5/20/2020 3:38 PM
52	Thank you for your work. As a note, I was rejected for a retiree grant...paying an English cartoonist for illustrations was rejected. I understand why. So, I hired him with my own funds and we created a piece that is now circulating. In a roundabout way, the grant program was a catalyst. Tom Skovholt Here is the title: An Open Letter of Love and Care to Health Care Professionals with Resilience Strategies for the COVID-19 War Thomas Skovholt, PhD, LP & Michelle Trotter-Mathison, PhD, LP	5/20/2020 3:29 PM
53	Thanks to the officers and board members for planning and managing a wide variety of interesting, educational offerings. Much appreciated!	5/20/2020 2:58 PM
54	I think many members wil be so uncomfortable with the technology they do not try. Perhaps a focused email listing some members who are willing to help others get on Zoom would allow them to feel comfortable stating they need help.	5/20/2020 2:54 PM
55	UMRA is a good organization. I just hope it won't be too long before we can resume our usual activities. Meanwhile, keep the Zoom forums going.	5/20/2020 2:43 PM
56	Thank you for doing this survey. I hope the results will be useful to the leadership of UMRA. Please keep up the good work!	5/20/2020 2:36 PM
57	I thought the online meeting would be very appealing to a number of members. Even if we can go back to in-person, having the speaker broadcast to at-home members would seem like a valuable idea.	5/20/2020 2:27 PM
58	Continue with excellent forum speakers and workshops on line. I'm very satisfied with this medium while we wait out the pandemic. Thank you!	5/20/2020 2:23 PM



# PDGR Impact Study

- 133 Grants since 2009. Reports on file at OVPR
- So what? June 2020 Impact Study.
- Survey of 2014-2019 grant recipients – 78% response rate
- So far 9 books, 48 journal articles, art exhibits, etc.
- >80% had a positive impact on reputation of University and or dept.
- Also impact on society (68%) and individual people (84%)
- “It enabled me to begin a successful post-retirement trajectory of scholarship.”
- The award “...made my transition from an active faculty member a smoother and less traumatic experience.”

# PDGR Impact Study

## Examples

- Josie Johnson, *Hope in the Struggle*
- Update of *Campus Divided* website
- Romano article on psychology of COVID-19 pandemic (forthcoming)
- Citizen monitoring of lake water quality using cell phones
- Exemplary math program award to UMTYMP for gender balance
- 2 Fulbright awards (Asher & Romano) & many other awards
- New company marketing family therapy videos in multiple languages

# **Department Engagement with Retirees and Volunteer Possibilities**

## Summary of Annual Summary Report for UMRA

The **overall purpose** of this effort is to –

1. Raise awareness of UMN retirees with department heads/chairs
2. Identify best practices for department engagement with retirees
3. Identify volunteer opportunities inside the U.

In general, departments continue a connection with their faculty and staff retirees through invitations to annual banquets, periodic informal gatherings, and personal friendships, as well as the relatively standard emeritus status for faculty – office space (as available, admin support sometimes, ...). In a few instances, there are more involved connections. These include department lunches specific to retirees, invitations to department seminars, and requests to retirees to advocate for the department's interests. Most departments maintain contact information for their retirees and some include them in their online directories. Departments may also contract with retirees to fill vacancies on a temporary basis or to continue involvement with their prior clinical studies or research. Emeritus faculty may also advise students in some instances on a co-advising basis.

### **Next Steps**

1. Continue discussions with additional department heads/chairs to include a broader, representative cross-section of the university.

2. Prepare a document for presentation/discussion with department heads/chairs and then share with them the “best practices” they may wish to implement within their own organizations.
3. Identify UMRA and URVC actions to implement that will lead to greater engagement of the university with retirees.

# **Department Engagement with Retirees and**

## **Volunteer Possibilities**

Annual Summary Report for UMRA

August 31, 2019 (with additional items 10/25/19)

### **Summary and Purpose**

University of Minnesota departments vary in their level of engagement with UMN faculty and staff retirees. Some are highly engaged while others may only note in passing that, yes, they have faculty and staff who have retired from their departments.

The overall purpose of this effort is to increase the role of university retirees (faculty and staff) within the University of Minnesota with a beneficial result for both the retirees and the university.

The “Findings” shown below are divided into 2 categories –

1. Department Engagement with Retirees
2. Volunteer Possibilities for Retirees in Departments

In general, departments continue a connection with their faculty and staff retirees through invitations to annual banquets, periodic informal gatherings, and personal friendships, as well as the relatively standard emeritus status for faculty – office space (as available, admin support sometimes, ...). In a few instances, there are more involved connections. These include department lunches specific to retirees, invitations to department seminars, and requests to retirees to advocate for the department’s interests. Most departments maintain contact information for their retirees and some include them in their online directories. Departments may also contract with retirees to fill vacancies on a temporary basis

or to continue involvement with their prior clinical studies or research. Emeritus faculty may also advise students in some instances on a co-advising basis.

Volunteer roles for retirees (primarily emeritus) include interviewing new faculty applicants although this was one area with substantial differences in approach among the departments I contacted. Some thought this was inappropriate since they believed the current faculty should determine the future direction of the department. Others thought this was valuable since the retired faculty have a great deal of expertise and life experiences that were deemed useful in selecting new faculty. Other volunteer possibilities are listed in the Volunteer section below.

This work was initiated by Jerry Rinehart with a request to Carl Adams and me “to gather information and perhaps create a “best practices” program to both recognize units doing outstanding work with retirees and to encourage more areas to undertake such activities.”

Over the past several months I’ve talked with and met 16 department heads/chairs and others to discuss how they maintain connections with their retirees. I have 4 more discussions currently scheduled and welcome more suggestions and introductions to other departments and especially in CLA, CFANS, CBS, Law, CSE and other university units. See list below. During these relatively brief discussions I also provided information to them about retirees as potential volunteers for their organizations through the University Retiree Volunteer Center (URVC).

Carl and I met several times to lay the foundation for these information gathering discussions and identified three focus areas –

1. Raise awareness of UMN retirees with department heads/chairs
2. Identify best practices for department engagement with retirees

3. Identify volunteer opportunities inside the U.

### **Next Steps**

1. Continue discussions with additional department heads/chairs to include a broader, representative cross-section of the university.
2. Prepare a document for presentation/discussion with department heads/chairs and then share with them the “best practices” they may wish to implement within their own organizations.
3. Identify UMRA and URVC actions to implement that will lead to greater engagement of the university with retirees.

### **Findings**

Everyone I contacted was receptive and happy to discuss the role of retirees in their organizations. Even the ones with relatively low levels of engagement appreciated our discussion if for no other reason than to raise their awareness of this potentially valuable resource for them.

Listed below are the activities the various departments mentioned regarding retirees. Some of these are common to several departments and some are specific to a single department.

1. Department Engagement with Retirees
  - a. Events – This was the most commonly mentioned retiree engagement
    - i. Annual banquet specifically for retirees (faculty and staff)
    - ii. Annual awards banquet for grad and undergrad includes retired faculty
    - iii. Award banquets for alumni – retirees invited

- iv. Retirement party/event for new retiree, invite other department retirees back, faculty and staff retirees
- v. Department lunches for retirees
- vi. Department seminars – invite retirees
- vii. Spouses of deceased faculty continue to be invited to events
- viii. “Coffee with Colleagues” – Fridays, invite retirees, no presentations, social, maintain connections
- ix. Department seminars – retired faculty on the mail notification list

b. Activities

- i. Advocacy for the department’s interests.
- ii. Financial donations to the department
- iii. Emeritus faculty participate in candidate interviews, provide input but not involved with final hiring decision. Another department head did not believe retirees should participate in interviews since the younger and current faculty should guide future department directions. This was a particularly interesting topic since some departments actively seek retired faculty involvement with recruiting new faculty while others viewed this as inappropriate. The latter believed the future direction of the department should be determined by the current faculty and not retired faculty.
- iv. There is typically no department committee work done by retired faculty.
- v. Emeritus faculty may sometimes continue to advise students in a co-advisory role
- vi. Retired faculty continue to work for department as “casual employees” under contractual agreement
- vii. Continue to participate in previous on-going clinical studies or other research
- viii. Retired staff sometimes asked to return to fill a vacancy part-time
- ix. Office space and administrative support for retired faculty (emeritus) – if available

c. Communication with retirees



- i. Many (or most) departments maintain contact information for their retirees.
- ii. Department newsletter sent to retirees – faculty and staff
- iii. Department phone directory and the department’s website includes retired faculty, if they wish.
- d. Items of special note
  - i. In one department, the retiree receives a jacket – Maroon with gold buttons and the university seal
  - ii. This same department considers their retirees to be “part of the extended family”

These discussions also included, if there was time, the possible role of retirees as volunteers in the departments. The list below includes some of the possibilities. I provided URVC information to them to share with others who may have need for volunteers.

## 2. Volunteer Possibilities for Retirees in Departments

- a. Student related
  - i. Retired faculty to serve as job interviewers to help students prepare for the work world.
  - ii. Mock interviews for students
  - iii. Internships – our volunteers send info to departments if they become aware of openings e.g. in companies
  - iv. Mentors for students, women, minorities. Chemistry is losing many students the “lower end”. Need tutors/mentors.
  - v. Share career experiences with students to help guide their career related decisions
  - vi. Share career experiences with students to help guide their decisions and paths e.g. Pharmacology Graduate Student Organization (PGSO)
  - vii. Provide contacts to the department regarding internship opportunities in companies.

- viii. STEM outreach – tutors, high school connections, minority connections, women in CEMS, women’s issues in STEM fields
  - ix. Retirees continue to teach on-line courses through an “Emeriti University” format
  - x. Judges for student projects e.g. robot show
  - xi. Senior Design Projects
  - xii. Shows i.e science based, need volunteers to engage with students before and after the show (13,000 students with 5,000 to 7,000 on the waiting list – Chemistry), Robot Show judges (Mech Engr).
- b. Research related
- i. Medical research – participant subjects
  - ii. Tissue donors – e.g. blood, skin, saliva, urine, ...
  - iii. Mentors for innovation, translation of research to commercial use, connection with investors
  - iv. Grant writing
  - v. Vehicle simulation lab – looking for subjects e.g. elderly use of vehicles, getting in and getting out of a car, ...
  - vi. Bio sample donors – blood, skin, saliva, urine, ... This might be administered by the Surgery department, for example.
- c. Department wide related
- i. Advocate for the university and for departments e.g. bonding request for a new building, lab space, ...
  - ii. Mentors for early career faculty

These discussions included a note about philanthropy and how retirees have contributed to the university. Although not surprising there is evidence from a Fidelity report “The Role of Volunteering in Philanthropy – 2014” that people who volunteer for an organization are more likely to make financial donations to that organization. When it seemed appropriate I mentioned that UMRA members have contributed a total of \$40.7 million to the U during their lifetime in giving or planned giving. This is based on information from a UM Foundation email from Lynn Praska to Bill Donohue and Jerry Rinehart, cc John Anderson and others,

dated August 7, 2018. Most discussions noted this was not a primary reason to engage with retirees but it was still something of interest to the departments.

## Department Heads/Chairs

This is a table of the people I contacted, have scheduled, or plan to schedule for face to face discussions.

I'd like to recognize and thank Frank Cerra, John Anderson, and Jean Kinsey for their introductions to many of these department heads and chairs.

<b>Department</b>	<b>Role</b>	<b>Last Name</b>	<b>First Name</b>
Applied Economics	Department Head	Homan	Frances
Chemical Engineering and Materials Sci	Department Head	Frisbie	Dan
Chemistry	Department Head	Blank	David
Clinical and Translational Sci Inst (CTSI)	Operations Manager	Osowski	Jessie
CTSI	Recruitment Ctr Mgr	De La Cruz	Cristy
Family Medicine and Community Health	Department Head	Pacala	Jim
Genetics, Cell Biology and Development	Department Head	Hays	Tom
Integrative Biology and Physiology	Department Head	Metzger	Joe
Mech Eng	Vehicle Simulation Lab	Morris	Nichole
Mech Eng	Robot Show Judges	Piorek	Tori
Mechanical Engineering	Department Head	Mantell	Sue
Medicine	Director, Admin Center	Schwind	Ann
Microbiology and Immunology	Department Head	Haase	Ashley
Molecular and Cellular Biology	Department Head	Bernlohr	David
Molecular and Cellular Biology	Retired	Lundell	Randi
Neurology	Chair	Vitek	Jerrold
Neuroscience	Department Head	Ebner	Tim
OBGYN and Women's Health	Chair	John	Fischer
Orthopaedic Surgery	Chair	Clohisy	Denis
Otolaryngology, Head and Neck Surgery	Department Head	Yueh	Bevan
Pharmacology	Department Head	Siegfried	Jill
Psychiatry and Behavioral Science	Department Head	Vinogradov	Sophia
Surgery	Chair	Ikramuddin	Sayeed

## **Department Engagement with Retirees**

Additional Items of Note (10/25/19)

These are additions to the August 31, 2019 report (“Department Engagement with Retirees”) based on further conversations with department and unit heads/chairs.

1. Jerry Vitek (Neurology department Chair) suggested an advocacy role for UMRA and retirees in support of funding, buildings, research centers, ... as a credible third party group. This could include input to the university, Regents, and legislature.
2. Connect with department’s Clinical Research Coordinator for volunteers as human subjects/participants.

August 12, 2020

**To: UMRA Retreat Participants**

**From: Jan Morlock and Jerry Rinehart**

**Subject: Big 10 Counterpart Organizations' Adaptations and Responses to the COVID Era**

Our UMRA board members and committee chairs will meet on August 25 for a retreat with the theme of how to keep our organization vibrant. In preparation for the retreat, we (Jerry and Jan) offered to contact the counterpart retiree organizations in the Big 10 to see how they are responding to the challenges and keeping their members engaged during the COVID-19 pandemic. We started with an inquiry to the Big 10 Retirees Associations list serve, inviting the organizations to reply if they were interested in talking with us. We had immediate responses from retiree organization representatives from Michigan State, the University of Michigan, Northwestern, Penn State, and Purdue.

At the same time, we reviewed the websites and newsletters of each of the fourteen Big 10 organizations to get a sense of their activities and to identify any other organizations that we might want to contact beyond the five who had already replied.

We decided to follow up by phone with the five individuals who contacted us, and to add to that list the Ohio State University, for a total of six organizations. Interviews were conducted in June, 2020. A summary of the results of each of those interviews follows below.

**Some highlights of what we learned:**

**Status of programs:** Every organization has shut down in-person meetings and programs.

Several suspended all member meetings and programs at least through the summer. UMRA is one of a few that converted rapidly to virtual meetings and programs, following the COVID shutdown.

**Use of technology:** Organizations that are remaining active are in some stage of transition to using technology for meetings and programs. Zoom is the format that all reported using. Some are planning to use technology to replicate some or all their pre-COVID programs, and a few are looking beyond that to use technology to make permanent enhancements to their programs and member engagement.

- For example, the University of Michigan created a Facebook group where their members can maintain social connections, drive the content, and create informal events--the group now has 250 members. They're also planning to use the zoom

capability as an opportunity to recruit and engage more of their members and potential members who are living all over the world and those who are otherwise not able to attend in person. They created a pdf brochure for guest speakers and members on how to prepare for speaking on zoom, and best practices to use in hosting a virtual event.

- Michigan State University is looking to use zoom more extensively by their Cultural Arts Committee for virtual tours and “watching parties.”

**Volunteer skills have been key in adapting to the challenges:** Two of the organizations doing the most for outreach and programming with technology have board member/volunteers who are retirees from technology positions and brought a boost of expertise to the organizations.

**Relationships with the institution:** Several of the stronger organizations have mutually beneficial relationships with university administration, formal and informal. Michigan, Michigan State, and Purdue have strong relationships, including administrative support, with the Vice President for HR. Penn State’s organization is assisted by the combined office of Alumni Affairs/University Foundation. Northwestern’s organization is supported by the Provost. Often, university administrators periodically attend or are represented at membership events and board meetings.

**Other important relationships:**

- The Michigan organization has 16+ corporate or university sponsors who collectively provide \$30K/year in support for programs or communications and who are invited to “table” at the in-person meetings. Ohio State similarly has multiple sponsors from the business community.
- The Northwestern University organization offers mini-courses free to the public in partnership with the Evanston Public Library--good PR for both the organization and the university.

A summary of our telephone interviews:

**Roger Baldwin, President, Michigan State University Retirees Association**

Current Status of Activities:

In late March MSU had one workshop offered by a financial planning firm that underwrites the Association. They had an extra Board meeting in June and another planned for July; a virtual retreat is planned for August. Monthly Board meetings will continue on Zoom, and they are planning to convert everything to Zoom in Fall.

Note: MSU Assoc was not part of the University's Zoom contract, so they had to seek permission to be included. Thanks to retirees from IT and the Comptroller's office, they now have that access --which allows larger number of session participants—without charges.

What are you doing or considering to stay engaged with your members during this time?

MSU's Social Activities Committee is considering smaller, virtual social events: E.g. NetFlicks movie night—apparently Chrome allows sharing of particular films, allowing break times for popcorn and conversations among viewers. (Just prior to the pandemic, they had started theater events with dinner that were successful)

E.g. Virtual tours of museums etc. Given the current state of affairs, they are considering virtual tours of, for example, the National Gallery of African American History. These would have some type of starter “set up” commentary, with follow up discussion. He indicated they are really thinking how they can increase the diversity of their membership and how the Association can play a constructive role in addressing racial inequities.

What's working well? Baldwin indicated he has participated in recent AROHE virtual conferences and has found the “break out room” function in Zoom fairly successful. These had specific topics and an assigned facilitator. He mentioned a “take away” from the AROHE event he joined—something to the effect that “what brings members together is their connections with people (other members), not with the organization.”

Relationship to central administration: MSURA receives some in-kind support from the Office of Human Resources, but they do not have any paid staff. They were considering asking about getting a part time position funded, but with the forecasted deficits, they have abandoned this idea. They sometimes struggle to find volunteers to fill in key positions when individuals leave for vacation etc.

Other items of interest: Baldwin was interested in our MOU with the Provost's Office—he feels his organization really needed something like that. I indicated we could probably share the text of ours with him. [Is this ok?]

## **Ed Adams, Board Member, University of Michigan Retirees Association**

Current status of activities: Spring programs were suspended and are now introducing summer programs.. All board business is being conducted on zoom.

What are you doing or considering to stay engaged with your members during this time? Are now creating virtual summer programs. July 30 will be first member event via zoom with demo of new website and orientation to the zoom experience. Created a pdf brochure for guests and member speakers on how to prepare for speaking on zoom, and best practices to use. "Learn and Grow" workshops to start again in Sept will be via zoom. Launched a Facebook

group in December to offer social space--lightly moderated by one of their member/leaders; members of the Facebook group mostly drive the content; 250 retiree association members are using it to date.

What's working well? Of 10,000 retirees, 2,000 are members, ~200 traditionally show up at events. Virtual meetings will engage more members who live across the country, perhaps with a net positive gain in membership and participation. Virtual medium allows more nimble approach to offering programs on breaking topics, outside of their normal long-term schedule. Ed predicts they will continue to make their virtual outreach and programs more robust, even after COVID.

Relationship to central administration? Very strong connection thru VPHR, who attends 1 or 2 board meetings/year. VPHR provides office space; zoom license. VPHR provides access to major mailing each year to all 10K retirees. Provides email addresses for UMRA to directly contact retirees of the latest 3-months. Include UMRA in regular HR programs for pending retirees. Two years ago, UMRA drafted a formal letter to VPHR to strengthen the relationship.

Other items of interest: UMRA has 16+ sponsorships, yielding \$30K annual income for UMRA programs. Sponsors were given a table at in-person membership meetings, in addition to recognition in newsletter and website. Haven't decided yet how they will incorporate sponsors in the virtual meetings and programs. Through relationship with the Alumni Ass'n, UMRA members are invited to participate in a 3-day camp at the UMAA resort property on a lake in Michigan. Interesting that Ed Adams, who is driving much of the UMRA tech experiments, was Chief Technology Officer of the UM business school.

## **Al Telser, Past President, Northwestern Emeriti Organization**

Current status of activities: Holding monthly luncheon talks via zoom July, Aug, and thru end of 2020. Otherwise, events, trips, and tours cancelled. Quarterly newsletter continues. All board business on zoom.

What are you doing or considering to stay engaged with your members during this time?  
Holding monthly luncheon talks via zoom in July, Aug, and thru end of 2020.

What's working well? NEO offers free, open to the public mini-courses with Evanston Public Library, held at libraries and now online via zoom, avg 80 participants. NEO and other faculty donate their time to teach; library provides space, equipment, registration, publicity, technology. Topics so far include Five Lincoln Speeches; Four City Novels.



Relationship to central administration? Through Provost, who provides funding for part-time staff (15 hrs/wk). Staff supports the organization and manages the tech.

Other items of interest: Presently, only Emeritus faculty are eligible to join. NEO is now considering changing their policy to extend membership in future to other faculty and staff retirees.

## **Meg Teaford, President, the Ohio State University Retirees Association**

Current status of activities: They typically have had several smaller monthly breakfast group meetings (geographical locations). They recently tried one of these through Zoom but had a very poor turn out. She felt some of this was due to lack of promotion and reminders—she feels that reminder notices the day of the event seem to be important to Zoom success.

What are you doing or considering to stay engaged with your members during this time?

Two events of interest are planned:

- Virtual version of their big fall conference (which typically draws 300+ members and includes major speakers, breakout sessions, social time etc ) Conference includes participants from “branch campuses.” For this September they are converting to a virtual format. Sounds like they are relatively inexperienced in Zoom protocols and features, but the planning group is working their way through the issues. Other Items of Interest: They have a significant number of financial sponsors for each session of the conference, but several smaller firms have backed out this year due to financial constraints.
- They also are planning a live bus tour to Marietta in August; had a tremendous response and the bus filled to social distancing capacity of 40 within a few days. Tour is planned to include a boat ride and museum tour (assuming museums are open by then.) I could not tell how Meg felt about the likelihood of this really happening—but it has engaged the planning committee.

They also are currently thinking of four events per month starting in the fall —three pre-recorded, one live. She indicated they are creating a task force on diversity—they are putting a strong emphasis on increasing the diversity of their organization and finding a meaningful way to address racial divide/social justice issues.

What’s Working Well: Their social committee previously facilitated monthly luncheon meetings of 30-40 members with a speaker and discussion at local cafeterias. They are hoping to

begin convening these via Zoom. She hopes the Health and Wellness workshop committee will agree to offer these events virtually. Hoping to have a Saturday morning session on “Sleep.”

Relationship to central administration? They receive significant staff support from the Alumni Association—with technology (training and support for Zoom sessions) mailings, promotions etc.

Other Items of Interest: They have a significant number of financial sponsors for each session of their annual conference, but several smaller firms have backed out this year due to financial constraints. They are creating a task force on diversity—they are putting a strong emphasis on increasing the diversity of their organization and finding a meaningful way to address racial divide/social justice issues.

## **Alan Cameron, President, Penn State Retired Faculty/Staff Club**

Current status of activities: Penn State is in the process of reinvigorating its retirees organization. Problems they have been facing: Past leaders (about 10 years ago) severed or soured relationships with U administration, particularly HR, Alumni/Development office--areas which had been helpful resources. According to Cameron, at that time the Board itself functioned more as social gathering with little focus on organizational needs or issues. They’ve recognized that their current name (“Penn State Retired Faculty Staff Club”)—doesn’t resonate well with all retirees—perception that it is a “clubby” group for faculty only. As a result, the organization has had problems getting people to lead committees (currently all committees, except communications, consist of only one member--the chair). They have serious issues getting people to serve on the Board or fill Executive Committee roles. They are concerned about not having an effective leadership pipeline.

What are you doing or considering to stay engaged with your members during this time?

The organization has just completed a two-year strategic planning process.

- One result is a complete re-write of its constitution and by-laws. The membership is currently voting on these, as well as changing the organization’s name to “Penn State Retirees Association.”
- Strategic plan calls for rebuilding connections to the administration, particularly the Alumni Relations and Development Office. Some of this work is currently underway (see below)
- They will be establishing a “program committee” to plan monthly events and workshops—previously this was basically handled solely by the President.
- The Board believes having greater visibility within the campus community will help build awareness of the organization and strengthen memberships.

What's Working Well: They have held three Board meetings on Zoom (one meeting on revisions to Bylaws and Constitution went three hours.) They are reestablishing their quarterly newsletter and hope to move to electronic-only version in near future. They are hoping to revive their website (which Cameron described as out of date and "abysmal.") They recently worked with students on campus creating a Food Bank; they are seeking better connections with OLLI.

Relationship to central administration? They worked with the Alumni Office to resurrect an annual mailing (that had been dropped several years ago) to all PSU retirees (7000+). The publication is 12 pages with University graphics and design; it includes information about the retiree organization as well as updates regarding the University and a pitch for contributions to PSU.

Other Items of Interest: Cameron was very optimistic that the just completed strategic planning process will help them work their way through the challenges resulting from the COVID related restrictions. And he feels he helped re-establish good connections with HR leadership and the Provost—essential elements to future success.

## **Norman Long, President, Purdue University Retirees Association**

Current status of activities: PURA cancelled programming April thru end of 2020, including their annual all-day Purposeful Living in Retirement conference usually held in April—an event for members with workshops, and the in-person annual kick-off program in September with meal and program, generally drawing 275 participants. Of PURA's twelve standing committees, only three will be active for rest of the year. This includes the Benefits Committee, meeting monthly online; negotiates benefits on behalf of all retirees with United Health Care. The committee is advised by OHR.

What are you doing or considering to stay engaged with your members? Continuing to publish the newsletter monthly. The first post-COVID program event will be a 30-minute virtual (zoom) call with membership to kick off the new year. If that's successful, will initiate monthly noon zoom membership events with guest speakers.

Relationship with central administration? Through the Vice President for Human Resources--the VPOHR Bill Bell attends some Executive Committee meetings and membership meetings. His Admin Assistant is liaison with PURA; provides administrative services to PURA, keeps the documents of the organization and attends board meetings.

Other items of interest:

- PURA, as a unit affiliated with OHR, is effectively the negotiating\_committee on retiree benefits with Purdue's health care insurance vendor.
- PURA has an annual award program for a university unit doing the best work for its retirees, with \$2,500.00 cash award to the unit to further enhance retiree programs. Purdue Extension has most frequently been the recipient of the award, but it has also been awarded to administrative units including the campus fire department. PURA awards annual student scholarship(s) through partnership with the Purdue dean of students office, using proceeds from an endowment created by PURA that is now at \$150,000.

13 August 2020

TO: Retreat participants  
FROM: Cathy Lee Gierke  
Chip Peterson  
Jerry Rinehart  
RE: **Implementing the Organizational Continuity and Memory proposal**

This memo describes the proposed record-keeping system and offers guidance for submitting end-of-year reports and other key materials—both to improve the year-to-year running of UMRA and to enhance the scope and accessibility of its historical record. Please read carefully; it affects the majority of retreat participants. Most of you have recently received the email calls for submission from Cathy Lee Gierke and Gloria Williams that are described in this document.

The larger report of our task force includes several other recommendations not covered here, such as the compilation of a policy library, cross-training of backups for selected positions, and oversight of the process by the Communication and Outreach Committee. Here we have focused just on what you need to know for the dimensions we will be discussing at the retreat, i.e., the task of selecting/updating/submitting materials this summer.

## **Key points about this new system**

In developing this initiative, a guiding principle has been to make the system as user-friendly as possible for those responsible for developing, updating, and submitting documents. The following summarizes:

- Each document or type of document will have a designated “owner” responsible for its management. See “Document Update Roles” Excel sheet for list of owners; the Operating Manual will also list documents each role is responsible to update.
- Documents will be stored as hard copies at the University Archives, and as digital PDF files on the website (with some exceptions).
- Two important new sets of documents are to be added to what we have done in the past: a “Toolkit” for each position or committee, and a collection of board-approved policies. Some existing documents not currently on the website will also be added to online documents storage, including board meeting packets, survey results, biannual retreat reports, and other important historical documents. A home will be created on the website for each of these document types. More below.
- During the latter part of the summer, the webmaster (currently Cathy Lee Gierke) will send an email notice requesting document updates from document owners. Updates will be sent as email attachments to the Webmaster (currently Cathy Lee Gierke).
- The Historian will decide which documents need to be printed for archiving, and UMRA will get them printed.

- To avoid using documents from people’s hard drives, where provenance is unknown, the PDF on the website will serve as the “official” source document for any future rounds of updating, with the exception of position and committee Toolkits, which may be kept by the owner and updated as needed.

## **Instructions for submitting documents**

When the request for updates is sent to document and web page owners in late summer it, will include a link to the document to be updated, and instructions for making updates. The webmaster will assist with document conversion where necessary.

**Preparing/updating documents:** Please use recommended format guidelines (below) for creating new documents. For updating documents, the original on the webpage is to be used as the source document for the update. If the owner does not have access to convert the web page pdf to an editable format, or to edit it in pdf, the webmaster will assist with conversion to an editable format and afterward from editable format to pdf.

Many documents or web pages are also updated during the year. This process does not change these normal updates, but it does assure that our full set of operational documents are updated regularly (see “Document Update Roles” Excel document).

**Document format guidelines:** UMRA currently has no template or required format for documents. However, the following are essential for all documents:

- Title or Subject line (all documents)
- Date (all documents)
- From: Author. (There may be documents, such as Bylaws, where no author is needed.)
- To: (audience). In many cases this is important.
- Other contextual information when needed to make the document meaningful to the uninitiated reader or to a future historian. For example, a document proposing a new policy or a new initiative ought to include a brief outline of the issues or needs that have led to it.
- To avoid confusion among versions, minutes should be labeled either “Pending Approval” or “Approved.”

**Submitting documents;** Owners will send their documents as email attachments both to the Historian (currently Gloria Williams) and to the webmaster (currently Cathy Lee Gierke), who will accept material only from the designated document owner. *Deadline:* September 1.

**Getting a head start:** The webmaster’s call for submissions will list the documents for which each recipient is responsible. You can avoid a late-summer crunch by referencing the “Document Update Roles” Excel sheet or the Operating Manual to determine which documents you are responsible for updating.

**Addendum: Why this initiative?**

In any volunteer-run association, and especially those made up of retirees, turnover is rapid and organizational amnesia problematic. Past policy decisions are easily forgotten; how-to expertise is lost as positions turn over; large gaps occur in written records; organization of those records that do exist is often haphazard; and important documents may reside only on individual members' hard drives. The sudden death or disability of a key figure can cause considerable disarray.

UMRA is probably better off than most of its counterparts in this respect. A good deal of history is available on our website, especially in the form of past newsletters and Board minutes. A much more complete paper record spanning our entire existence resides in the University Archives (although, of course, information there is labor-intensive to tap). Our annually-updated Operating Manual helps pass on procedures and division of labor from one cohort to another. Orientation sessions for new Board members are a helpful recent addition.

To build further on these strengths, as one of UMRA's major initiatives this year a Task Force on Organizational Memory and Continuity has been working with the board to design a process and guidelines for more extensive and systematic online storage of key documents.

## **Appendix: More on Position Toolkits**

### **What are Toolkits?**

The Operating Manual outlines the duties of each key UMRA position. Toolkits in turn are collections of materials that can help you or your successor carry out those duties for your position.

The content of a Toolkit is entirely up to the position's occupant. Some will include many files, others few. The number of files will likely grow with time as new occupants add more tools to the collection inherited from predecessors.

The following are examples of items that might be included in a Toolkit:

- "How-to" guides to a position
- Workflow calendars (tasks done at specific times of the year)
- Templates for, or examples of, recurring document types or email messages

The content of a Toolkit is entirely up to the position's occupant. Some will include many items, others few. The number of items will likely grow with time as new occupants add more tools to the collection inherited from predecessors. Checking out other toolkits on the website from time to time may generate ideas for what to include in your own.

To submit your toolkit for posting on the website, please arrange its items in a logical order and then consolidate all of them into a single document. Add a cover memo listing the included items and describing briefly the function of each.

### **A suggestion for updating your Toolkit in future years**

Each document owner will devise a his or her process for updating the Toolkits. Some might find the following worth consideration:

- On your hard drive, keep all of your Toolkit items in a folder whose title includes the year. For example, the folder for the Toolkit you will submit at the end of this summer will be called, "[Position] Toolkit 2020-21." Include 2020-21 in file name for each document within that folder as well.
- After you have sent the toolkit's component documents to the Webmaster and the Historian, duplicate the folder, rename the new folder "[Position] Toolkit 2021-22 drafts," and change the year in each document filename within it as well.
- To avoid confusion between older and current versions, now store the 2020-21 folder in a folder named something like, "Toolkits—old."
- Throughout the 2020-21 year you can now draft new documents, and revise existing documents piecemeal, as ideas strike you.
- When it's time for the annual revision during the summer of 2021, you may already have accomplished much of the work to be done. You can then complete the update, send the new pdfs to the webmaster, and start the next round with another duplication and renaming of folders and their component files.





# Continuity & Archives

Part of our new process, is where the new documents will be stored, and how to find them.

- [Governance webpage](#) has recent key documents
- [Archives page](#) has all historical key documents
- New pages added as a result of Continuity work now hold documents from officers, committees, liaisons, representatives & all key positions
- [A secured page](#) holds non-public documents.

## Governance page

The Governance page holds important recent organizational documents:

- Operational Documents (*Personnel, Membership Directory, Bylaws, Operating Manual, MOU, UMRA Organization Chart*)
- Treasurers' reports (5 years)
- UMRA Minutes (the past year -- 9 meetings)

Each of these lists also includes a link to the Archives page, where older documents are found.

## Archives page

The Archives page holds important organizational documents, as far back as we have them. Each list is paginated.

- Operational Documents
- Treasurers' reports
- UMRA Minutes
- Policies list (\*new\*)

Additional archival records exist on additional historical documents on related pages, linked from the Archives page. They are:

[Past News & Events](#)

[Past Forums & Workshops](#)

[Past Program Summaries](#)

[Past Event Slides](#)

[Newsletter Archives](#)

[Photos](#)

[UMRA History](#)

## New Archival pages

[Officers Archives](#)

[Committee Archives](#)

[Rep & Liaison Archives](#)

[Interest Group Archives](#)

[Communications & Tech Archives](#)

[Secure Documents](#)

## Tips: Searching the UMRA archives

Find information quickly and effectively using the Search field (upper right corner of each page):

- **Enclose search terms in quotes:** (Example: "Steve Jobs") Forces an exact match, excluding synonyms and partial matches. Steve Smith or Jobs reports will not be returned in results, this way.
- **Specify the document type:** (Example: filetype:pdf steve jobs). Searches only in a specified document type (used to exclude web pages). Any valid extension can be used (e.g. PDF, DOCX, HTML, PPT, ...)
- **Exclude a word using "-":** (Example: steve jobs -apple). Returns only pages/docs having both steve and jobs, but NOT apple, resulting in a much shorter list!

[More...](#)

[More...](#) (above) links to a page with extended Google Search commands. More examples of the most useful commands are below.

When searching the UMRA site for something that you know to be in a document, and not a web page, specify a **document type** of PDF in the search (see above): **filetype:pdf policy**

Using **quotes** around your search terms will find exactly the phrase used, instead of searching for any of the terms used in any order. It narrows down your results, focusing in on the exact thing you are seeking.

For lack of a better example, searching for **"Cathy Gierke"** will come up 2 pages of results with that exact name. Whereas, searching for **Cathy Gierke**, with no quotes finds 10 pages of results, including instances of my full name, Cathy Lee Gierke or Cathy L. Gierke; and re-ordered names, Lee Gierke, Cathy; in addition to the instances of Cathy Gierke found with the quoted search terms.

<b>Document</b>	<b>Document Owner</b>	<b>New to Web</b>	<b>Web doc coordinator</b>	<b>Archival doc coordinator</b>	<b>Process Sponsor</b>
Association Minutes	Secretary		Webmaster	***	President
Board Minutes (approved) *	Secretary		Webmaster	***	President
Exec Cmt Minutes	Secretary	x	Webmaster	***	President
Treasurer's Annual report *	Treasurer		Webmaster	***	President
Newsletter	News Editor		Webmaster	***	President
News articles (Pres)	News Editor		Webmaster	***	President
Event Slides	Program Chair		Webmaster	***	President
UMRA history documentation	Historian		Webmaster	***	President
Annual list of PDGR Grants*	PDGR Chair		Webmaster	***	President
Bylaws	President		Webmaster	***	President
Personnel --	Incoming President		Webmaster	***	President
Operating Manual --	Outgoing & incoming Presidents		Webmaster	***	President
Organizational Tree Doc --			Webmaster	***	President
MOU	President		Webmaster	***	President
UMRA monthly speakers since 2004	Program Chair		Webmaster	***	President
UMRA workshops since 2006	Cares Chair		Webmaster	***	President
UMRA officers since 1992	Incoming President		Webmaster	***	President
UMRA board members since 1993	Incoming President		Webmaster	***	President
Board packets (sent by Pres)/agenda	President	x	Webmaster	***	President
Annual reports from officers, committees, liasons, reps (except as listed above)	officer, committee chair, liason, rep	x	***	Historian	President
Membership directory	Membership	x	Webmaster	***	President
Retreat Report	Outgoing President	x	***	Historian	President
Survey Results/Summaries	Surveyor	x	***	Historian	President
Other such as Town Hall notes	TBA	x	***	Historian	President

Toolkits	Committee Chair	x	***	Historian	President
UMRA Policies	Secretary/Pres	x	Webmaster	***	President
Format template (date, author, etc.)	Secretary/Pres	x	Webmaster	***	President
President's papers	President	x	not on web	Historian	President
<b>The below are all pages on the web</b>					
Home Rotator texts	News Editor/Webmaster		webmaster		President
Home-->About	President		webmaster		President
Home-->Umra Fact Sheet	Kris Mortensen		webmaster		President
Home-->About Website	Webmaster		webmaster		President
Home-->Members by Location	Will Craig		webmaster		President
Events intro text boxes	eponymous groups		webmaster		President
Events-->Monthly Programs:slides	News Editor		webmaster		President
Events-->Monthly Programs:calendar	webmaster/program committee		webmaster		President
Events-->Monthly Programs:summari	News Editor		webmaster		President
Events-->Interest Groups:text	eponymous groups		webmaster		President
Events-->Social Activities:text	Social Activities		webmaster		President
Events-->Travel Tours:text	Travel Tours		webmaster		President
Member Benefits	Membership committee		webmaster		President
Member Benefits-->Join Renew	RSVP person/webmaster		webmaster		President
Member Benefits-->Discounts	Membership committee		webmaster		President
Member Benefits-->Resources	Cares Committee		webmaster		President
ServingU: texts	eponymous groups		webmaster		President
Newsletters/From the President	News Editor/President		webmaster		President

Governance	docs as ABOVE
Governance-->Committees	eponymous groups

webmaster  
webmaster

President  
President

## New to Web

**These docs will need to be created or collected before they can be uploaded to the web (as part of the summer update cycle?) since they either do not exist, or are not centrally located, currently.**

<b>Process Role</b>	<b>Role description</b>
Document Owner	see <a href="https://sixsigmastudyguide.com/six-sigma-roles-and-responsibilities-study-guide/">https://sixsigmastudyguide.com/six-sigma-roles-and-responsibilities-study-guide/</a> This is the person who will be responsible to review and/or update the document during the annual update cycle.
Web Document Coordinator (Archive doc coordinator will need to identified, separately)	Collects documents to be stored on the web from the appropriate owners; and manages the annual update cycle, distributing links to documents making sure documents are properly editable, making sure the correct originals are used, and uploading documents to the web.
Process Sponsor	The President will back the Coordinator if needed to encourage document updates
Institutional Process Owner	Communication committee is process owner for the web update cycle because they oversee the web. That is referenced in Jerry's notes. As process owner, they can adjust the process, or make changes, and they see that the document collection and update happens as intended.

Process Owner, and Sponsor are language from the domain of Process Management/Analysis. They have very specific meanings in that vernacular, which apply directly to our task of defining a process.

## How to create an UMRA Zoom webinar--a look behind the curtain

Kris Mortensen, revised 8/03/2020<sup>1</sup>

### Prerequisites

- A first-rate presenter
- A good-size audience
- A production worthy of both

### Creating the event

1. Recruit the speaker(s)
2. Recruit the panelists (see Zoom webinar roles defined below)
3. Create the invitation. Requirements include:
  - a. Date, time, duration
  - b. Description
  - c. Short speaker bio
  - d. Speaker photo
  - e. "Branding" elements
    - i. UMRA banner
  - f. Create Z-link (for registering; used in UMRA website announcement)
  - g. Send "test" invite to self to proof
  - h. Send "test" registration page to self to proof
4. Send invitation to Attendees
  - a. Emailed via UMRA ListServ
5. Send invitation to Panelists
6. Publicize event in UMRA News and on [umra.umn.edu](http://umra.umn.edu)
  - a. Article written by program host/Program Committee member/other
  - b. Article edited by news editor
  - c. Article includes Z-link to webinar registration page
7. Monitor email for questions about invitation or registration from UMRA members, and respond
8. Schedule half-hour practice session with all Panelists ~ one week before the schedule event

### Producing the Zoom webinar

1. Production team roles:
  - a. Producer/Zoom host (responsible for all pre- and post-event arrangements; assists during event as needed)
  - b. Technical director/Zoom alternative host
    - i. starts, runs, and records the webinar
    - ii. controls video and audio for all panelists
    - iii. operates all PowerPoint slides and videos
    - iv. starts and runs practice session ~ one week before scheduled webinar
    - v. starts and runs final practice session 30 minutes before webinar starts
    - vi. troubleshoots all technical difficulties

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<sup>1</sup> For UMRA's 2020 Leadership Retreat



- c. Zoom co-host/Q&A moderator (shares many of the live event controls as the host but cannot start the event)
  - d. Panelist/Program host (opens/closes program)
  - e. Panelist/to introduce speaker (if other than the program host)
  - f. Panelist/Featured speaker(s)
  - g. Designated Attendee (watches the event as an attendee to be alert to and troubleshoot issues that Attendees may be experiencing; writes notes for post-event production team debrief)
  - h. Planted questioners (for Q&A)
2. Plan for technology glitch
    - a. Switch to slide: *We are currently experiencing technical difficulties and will be pausing the presentation. Thank you for your patience.*
    - b. Program host announcement: *Due to technical difficulties, we regret that we will have to end/reschedule this program. We apologize and will follow up with additional information by email.*

#### Post event

1. Production team debriefs via Zoom meeting immediately following event
2. Webinar recording is trimmed for posting on UMRA YouTube channel
3. Program host/Program Committee member thanks speaker(s) and their support staff
4. Program host/Program Committee member writes article summarizing the event for the UMRA website
5. UMRA webmaster posts the video recording
6. News editor edits and posts the article, adding a screenshot of the featured speaker during the webinar and link to the video recording

Month	Date	Event	Format	Speaker	Topic	Status
<b>2020</b>						
<b>May</b>	5/19/2020	Forum	Online, zoom webinar	Myron Frans, Minnesota Commissioner of Management and Budget		Confirmed
<b>June</b>	6/16/2020	Forum	Online, zoom webinar	Jon Christiansen, SPH	Medicare for All? Some? None?	Confirmed
<b>July</b>	7/7/2020	Workshop	Online, zoom webinar	Ted Bowman	Resilient Coping	Confirmed
	7/21/2020	Forum	Online, zoom webinar	Medaria Arradondo, MPD Chief	MPD Cultural Transformation	Confirmed
<b>August</b>	8/18/2020	Forum	Online, zoom webinar	UMN Provost Rachel T.A. Croson	TBC	Confirmed
<b>September</b>	9/8/2020	UMRA A.M.	Online, zoom webinar	Henning Schroeder, Director of International Programs, College of Pharmacy; Professor, Dept of Pharmaceutics; cultural commentator. Former UMN Vice Provost and Dean of Graduate Education. <a href="https://www.pharmacy.umn.edu/bio/pharmaceutics-faculty/henning-schroeder">https://www.pharmacy.umn.edu/bio/pharmaceutics-faculty/henning-schroeder</a>	Will "Vergangenheitsbewältigung" become the next German loanword in American English? (It means "working through the past," and yes, it's one word)	Confirmed
	9/15/2020	Workshop	Online, zoom	Jenny Blaine, Security Analyst with UM Office of Information Security	Cybersecurity: Safeguarding Your Data and Identity	Confirmed

	9/29/2020	Forum	Online, zoom webinar	Josie Johnson; possibly with her co-authors	<i>Hope in the Struggle: a Memoir</i>	Confirmed
<b>October</b>	10/13/2020	UMRA. A.M.	Online, zoom webinar	Kirsten Delegard, Co-founder and Project Director, Mapping Prejudice Project. Founder of Historyapolis. <a href="https://www.lib.umn.edu/about/staff/kirsten-delegard">https://www.lib.umn.edu/about/staff/kirsten-delegard</a>	Mapping Prejudice, <a href="https://twin-cities.umn.edu/news-events/mapping-prejudice-painful-part-minneapolis-history">https://twin-cities.umn.edu/news-events/mapping-prejudice-painful-part-minneapolis-history</a>	Confirmed
	10/20/2020	Workshop	Online, zoom webinar	UM Office of Human Resources	OHR Annual Benefits Update	
	10/27/2020	Forum	Online, zoom webinar	Drs. Katharine Nelson and Kathryn Cullen, Dept of Psychiatry and Behavioral Sciences	Crisis in Youth Mental Illness	Confirmed
<b>November</b>	11/10/2020	UMRA. A.M.	Online, zoom webinar	Dr. Timothy Schacker, Professor of Medicine, Division of Infectious Diseases and International Medicine, UMN	A vaccine for COVID-19	INVITED
	11/17/2020	Workshop	Online; zoom webinar	Lucy Rose Fischer		Confirmed
	11/24/2020	Forum	Online	Kathryn Pearson	2020 Election Analysis	Confirmed
<b>December</b>		TBD		TBD		
<b>2021</b>						
<b>January</b>	1/12/2021	UMRA A.M.	TBD	TBD		

	1/19/2021	Workshop	TBD	Brian, Allen M.D., physician at U of M Sports Medicine	Developing a Balanced Exercise Program	Confirmed
	1/26/2021	Forum	TBD	Brad Holschuh, Co-Director, Wearable Technology Laboratory	Wearable Technology: Principles, Applications, Challenges	Confirmed
<b>February</b>	2/9/2021	UMRA A.M.	TBD	TBD		
	2/16/2021	Workshop	TBD	Peter J Watson, Associate Professor of Speech-Language-Hearing	How Not to Sound Old	
	2/23/2021	UMRA Forum	TBD	TBD		
<b>March</b>	3/9/2021	UMRA A.M.	TBD	TBD		
	3/16/2021	Workshop	TBD	TBD		
	3/23/2021	Forum	TBD	TBD		
<b>April</b>	4/13/2021	UMRA A.M.	TBD	TBD		
	4/20/2021	Workshop	TBD	TBD		
	4/27/2021	Forum	TBD	TBD		
<b>May</b>	5/11/2021	UMRA A.M.	TBD	TBD		
	5/18/2021	Workshop	TBD	TBD		
	5/25/2021	Forum	TBD	Hold for Chair, Regents; UMRA Annual Meeting		
<b>June</b>	6/8/2021	UMRA A.M.	TBD	TBD		
	6/15/2021	Workshop	TBD	TBD		
	6/22/2021	Forum	TBD	TBD		

**Other  
Contacts**

**Notes**

Bill Donohue

Frank Cerra

Ron Matross to  
facilitate  
Greg Hestness

Bill Donohue  
invited

Contact: Jan.      See his articles and editorials.  
Introducer: Jerry  
Rinehart.

Ron Matross to facilitate

Invited by K O'B. Kris confirming arrangements  
Jan Hogan to be with Josie Johnson and Janice  
asked to Hogan  
introduce.

Contact: Jan. Delegard: (612) 812-0619;  
Introducer: deleg008@umn.edu  
Wendy Lougee  
(confirmed)

Frank Cerra to  
facilitate  
Is Frank original  
contact?

Invited by Jan schac008@umn.edu; Admin  
Ass't Craig Olson,  
olso7966@umn.edu

Invited by Bill  
Donohue

Ron Matross to  
facilitate

Suzanne  
Bardouche

Kris Mortenson to facilitate



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[Redacted]







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