

September 5, 2020

TO: UMRA Executive Committee

FROM: Jan Morlock

RE: Summary of breakout team reports, UMRA leadership retreat of August 25, 2020

At the leadership retreat on August 25 (on Zoom), six breakout teams of five+ participants each reported on their discussions of the day. Following is my summary of the ideas and recommendations, combined and grouped in four topics: Programs and Events, Member Engagement, Recruiting New Members, and Other. Entries followed by a numeral (X) were reported out by more than one team. Notations *in italics* are mine. Starting on page 3 of this document are the verbatim reports of each of the six teams, if you'd like to see further detail from their discussions.

Programs and Events:

- UMRA programs are key to the vitality of our organization. Maintain and continue to improve the quality of the programs.
- Continue the programs online (post-COVID) and open them to non-members. (2)
- Create a comprehensive UMRA calendar on or accessible from the website to show events and other activities, including any “pop up” activities at a glance.
- Encourage event registrants to get the zoom link into their calendars to ensure they are able to find the zoom link at the time of the event.
- Identify any issues with the transition from Securian to Fidelity, and hold a Zoom session with OHR and Fidelity reps to resolve remaining issues.
- Invite deans to speak at forums or A.M., raising awareness about UMRA within the colleges and awareness about the academic mission on the part of our members.
- Offer virtual tours (museums, countries).
- Raise dues to better support programs and social activities--having a budget may make more activities possible.
- Explore the feasibility of offering COVID testing to our members through a grant or clinical trials.

Member Engagement:

- Create a Facebook group for UMRA members. [*Gary Engstrand offered to create and administer.*] (3)
- Adapt the New Member Reception to a virtual format--in conjunction with a forum (before or following), or facilitate several smaller receptions/happy hours in zoom meeting format, hosted by member volunteers. Could be organized by zip code, or in group cohorts as members join. (2)
- Add more interest groups to provide more opportunity for member engagement and interaction: for example, adding book discussion; golf; walking; over-80 group; zip code groups--including “pop up” or short-term groups based on member interests. Leaders

with specific interests would be identified or emerge from the membership. *[What would it take to engender more of this?]* (3)

- Have interactive discussion breakouts following or associated with the forums to foster member engagement. (2)
- Build technology capacity (ex. Zoom) of our members to initiate and lead interest groups.
- Shared community service projects to raise camaraderie, visibility for UMRA. Examples: U's annual days of service; mentorship programs in collaboration with academic units; service travel. (2)
- Engage more members in functions and committees.
- Offer more member discounts for programs in the community. *[Bev Moe offered to follow up on member suggestions.]*
- Share with our members the MN Secretary of State's list of boards and commissions seeking participants, offering public engagement opportunities to our members and raising the profile of UMRA.

Recruiting New Members:

- Analyze the costs and benefits of expanding UMRA membership.
- Promote UMRA programs in *Brief*, the University's e-publication for employees. *[University Relations]*
- Promote the benefits of the PDGR program as we recruit new members.
- Deepen collaboration with UMAA, UMF to reach out to retirees.
- Improve relationship with OHR to enhance our ability to communicate with potential members.
- Send follow-up recruitment letters to retirees one, two, or three years after retirement. (3)
- Get direct access to PeopleSoft database to reach our target audience. (3)
- Invite to our events those who are anticipating retirement and those who did not renew after their first (free) year of UMRA membership.
- UMRA arrange our own pre-retirement seminars, or find ways to collaborate with U administration on this. *[Purdue and Ohio State retiree organizations do annual conferences on topics of interest to retirees that serve existing members but also potential new members.]*
- Facilitate personal contacts from current members to those preparing to retire from the current member's former department. Member volunteers to serve as liaison to their former department to get contact information for pending retirees and make personal contacts. (2)

Other:

- Start a fundraising program for UMRA--through crowdfunding, member donations through IRAs.
- Grow the PDGR program--encourage member donations through IRAs, targeting for 2021 when Required Minimum Distribution requirement kicks in.

Verbatim Breakout Team Reports

UMRA Leadership Retreat, 2020.8.25

Team 1: John Anderson, Will Craig, Nancy Fulton, Kris Mortensen, Andy Whitman

Several ideas were floated in our discussion.

1. To get more information to people retiring from the U of M, UMRA needs to improve our relationship with the Office of Human Resources (OHR). Currently, OHR sends our invitation letter to each month's cohort of new retirees. UMRA is informed only of the number of new retirees who have been sent the letter. UMRA should strive to get OHR to send a follow-up letter one or possibly two years after the initial letter since the timing of the initial letter may not be optimal. This possibility should be explored with Ken Horstman, Director of OHR.
2. UMRA should consider arranging our own pre-retirement seminar at which people about to retire can be informed about UMRA's existence and program of activities.
3. Send invitations to online forums to people who joined UMRA but chose not to renew their membership. Also send invitations to persons anticipating retirement.
4. Since personal invitations are more effective than impersonal letters current members should invite colleagues who are about to retire from their department or unit.
5. Encourage members who plan to participate in Zoom events to add the Zoom link to their calendar so that it is more accessible at the time of the event. This should reduce the number of no shows resulting from inability to locate the link at the time of the event.
6. Advertise the link to the Minnesota Secretary of State's list of boards and commissions that are seeking participants. There may be UMRA members who would fit well and could provide needed expertise.
7. Emphasize personal invitations to people to become UMRA members. Contact departments and units to get names of retirees. A study of the respondents to campaign focused on a particular online presentation would tell if this is a useful approach to gaining members.
8. Determine the issues which surfaced with the transition from Securian to Fidelity and then set up a Zoom meeting of OHR and Fidelity representatives to resolve remaining issues.
9. Implementation of items 2 and 3 above requires names and contact addresses of retirees which are not currently available to UMRA. Arrange for UMRA members familiar with PeopleSoft to access database of University personnel to ferret out contact information for our target audience.
10. Arrange for the new member reception normally held in conjunction with the October luncheon to be conducted via Zoom. It might be one fully independent Zoom event or held in conjunction with a forum or possibly as several smaller Zoom events scheduled during the year as new members are received. The latter option would facilitate a more personal interaction.

The report back session focused on items 1, 4, 7 and 9.

Team 2: Kinsey Group; Jean, John Bantle, Cherie Hamilton, Gloria Williams, Jerry Rinehart, Greg Hestness

Breakout 1

Why UMRA:

- Continued involvement with the U.
- Professional grants and development are a big deal.
- Stay connected to friends.
- Interested in many programs
- Photo club
- Sessions offered on important topics
- Travel?

Joy and Satisfaction:

- Staying involved with the U in any way.
- Involvement outside of the Alumni and Booster organizations
- We get many alumni emails and mailings none from UMRA
- As president developed the MOU with the Provost.

How became involved:

- Colleague retired earlier and made him aware of UMRA.
- Collecting things that should be in the archive.
- Writing the biography of a colleague.
- To have a voice with the Regents and Administration
- To get to know and reconnect with faculty, there are no turf fights, just friends.
- 5 years on the travel committee, chose Portugal, hope to provide two trips a year.

Breakout 2

How vibrant is UMRA, ideas and reflections?

- 7.3 on scale of 1-10
- Opportunities to engage with interesting people.

- Unlike campuses where the U is the only game in town (Penn State, Iowa City, Champagne-Urbana) there are many activities (i.e. pro sports in the TC).
- All the creative people around thing of great things to do.
- Creative grants are wonderful, could produce executive summaries or plain language abstracts for people to better appreciate the work.
- We tend to bury our accomplishments.
- UMRA is little known until approaching retirement.
- Vitality has increased in recent years.

Has COVID changed UMRA vibrancy?

- Members could possibly fill gaps for the University due to the financial impact of COVID.
- We could possibly have breakouts "after" a Forum, allowing smaller groups of members to discuss what they have just heard.
- We're together on Zoom thinking of new things.
- Let's be positive about this opportunity, we can be intellectually busy.
- Has increased the vitality of UMRA programming.
- Photo club is growing more on Zoom than it did with walk ins.

Breakout #3

Recommendations for a vibrant organizations (I know Jan captured most of these)

- ***Market to retirees and soon to be retirees***, research opportunities and how that benefits the University, connections to colleagues and meeting new colleagues from other disciplines, share the results of member research.
- Get a group together of 8-10 members, on Zoom, randomized.
- Create a Facebook page for UMRA.
- Continue the programs on line and open them to non-members.
- Grow the Grant program, in this time of financial stress for the University, encourage IRA donations, it is tax free. There is 2020 holiday from RMD's, target them for 2021 RMD.
- Our 45th year is coming up, celebrate.
- Invite potential new members to a luncheon/Forum.
- Collaborate with the Foundation and the Alumni Association, they are skilled in outreach, to reach out to retirees. (Jerry R says Penn State does this well)
- Offer ten person breakouts after Forums.
- Include articles or events in The Brief.

Jean Kinsey, John Bantle, Greg Hestness, Cherie Hamilton, Jerry Rinehart

(Jean): Looking at my own notes, I am adding a few comments.

In the short run, continue with zoom meetings.

Investigate some virtual tours of museums or countries.

Invite retirees around the world to sign into our Zoom Forums. (I have a question about whether, if we forward our registered invitation to someone else, they can access the zoom meeting?)

We might utilize the Alumni Assoc. list to find these people. Or, just invite our department's colleagues from on campus.

To the question about how UMRA is doing to be a vibrant organization, on a scale of 1-10, We had 2 #9s, 3 #7s, and 1 #6.

Social programs need a budget to be more attractive. Maybe we should raise the dues?

Team 3: Mary Koppel, Bill Donohue, Gary Engstrand, Bev Moe, KaiMay Terry, Gloria Williams

1. A taste of UMRA – invite friends, colleagues, and family to attend Zoom meetings. All of our group members joined because a member of UMRA invited them to participate in meeting or to fulfill a role or need in UMRA.
2. Obtain the retiree database from the University. Kathy Jensen (Gary Engstrand's spouse) may have a connection there. It is important to invite new retirees and again after a year or so when retirees are looking for doing something valuable with their time.
3. Consider setting up a Facebook page. Both Mary Koppel and Gary Engstrand offered help with setting it up and administering it.
4. Retain Zoom meetings after in-person meetings resume to provide alternatives to those who are not comfortable or cannot attend In person.
5. Invite Deans to speak at forums or UMRA AM. This will connect our membership to the work of the University and also to help make UMRA important to the University.
6. Continue to emphasize programing, programing and more programing. This is a valuable offering of UMRA to its members.
7. Explore the possibility of getting covid testing for UMRA members, through a grant, clinical trial or other means. UMRA membership is a valuable demographic for testing of new covid testing procedures.
8. Keep UMRA members connected with each other and our community by providing more opportunities for engagement and also more discounts for programs and organizations in the community. Bev Moe will follow up on all suggestions by UMRA members.

Team 4: Ron Matross, Cathy Lee Gierke, Eric Hockert, Chip Peterson, Catherine Wambach

Suggestions were made in two areas: attracting more members, and engaging current members

Attracting More Members

- The primary suggestion was to **reach out to retirees who have been retired for two or three years**, but who have not joined UMRA. The theory is that immediately after retirement, many

people aren't sure what they want to be involved in, but after a few years they become more settled and more interested in renewing their ties to the University.

Engaging Current Members

- **Start a Facebook group.** Facebook is a technically more feasible way to build an online community among members than was the short-lived UMRA bulletin board. It can be started and maintained with little effort and offers the possibility of providing some of the personal interaction that we have lost during the pandemic.
- **Increase the number of interest groups.** We could offer more opportunities for people to engage in smaller groups, at first online and then in-person. The member survey indicated that there was clear interest in expanding the number of book discussion groups beyond the current one. There may also be other interest groups, like an "over 80" group, golf group, etc.
- **Engage in shared social service projects.** One of the things people seek in retirement is purpose and UMRA can help in that pursuit by offering opportunities to engage in social service. It would be good if UMRA could develop a signature project or two that would get a large number of members working together at the same time. This kind of project not only gets people involved but also builds camaraderie among participants. And it could make UMRA more visible to a wider community. Possibilities include the U's annual Service Day, mentorship programs, and service travel.

Team 5: Donna Peterson, Vern Cardwell, Frank Cerra, Jan McCulloch, Barb Shiels Summary of Discussion

1. UMRA has attained a respectable level of vibrancy already
2. UMRA needs to expand its membership
 - a. Consider: more interest groups, make UMRA more accessible and usable for retirees in areas of their interest, use Zoom creatively, partnerships with other organizations
 - b. Engage faculty, staff, civil service and bargaining unit pre-retirement and after retirement
 - c. Establish a workgroup to determine ways to annually determine who is retiring, without contesting the current HR policy, e.g. departmental representatives, People Soft database
 - d. Maintain and improve quality programming and programs
3. Analyze the implication/potential needs of expanding the UMRA membership: management, technical, financial
4. Engage more membership in UMRA functions and committees
5. Assess when the membership is interested in and form programs around those interest, each led by one who is passionate about particular interest
6. Develop and implement a fundraising program, e.g crowdfunding, IRA donations

Team 6: Road Warriors or Swan Song--Craig Swan, Lynn Anderson, Virgil Larson, Jan Morlock, Claudia Parliament

Why are you a member of UMRA?

CP: She likes the friendship--former colleagues and meeting new people. We have a common bond. UMRA offers good programs and it's a chance to stay connected to the U.

JM: The new member welcome meeting made it an easy transition into UMRA for her. She gets to see people she wants to see. Great time to see people who are meaningful to her.

VL: He enjoys the activities he is involved with, the membership committee, utilizes his computer expertise and interest. He maintains the membership database which keeps him busy and involved. It is nice to meet new people. He and other membership committee members are starting to talk about how to do new member reception via Zoom.

CS: He likes meeting people and talking with them at luncheons and enjoys the substantive programs. He appreciates that not all of the programs are U of M focused. His photo club involvement is great and there are 25 active members with 12-18 attending each meeting on average. The shared interests among UMRA members is important to support.

LA: She enjoys seeing former colleagues and friends as well as meeting new people at monthly luncheons/forum, workshops, and through the photo club. She is happy to chair the Armchair Traveler Program and has been pleased at the positive response. It is fun to continue to use our skills for UMRA.

What to keep?

Meeting new people and engaging with them.

Finding shared interests. Finding niche ways to contribute/participate.
Nice to be part of something and responsible for something, we all need to be needed. Great to engage individuals.

Programs and activities allow us to get to know people and new connections. How to maintain those connections? We wondered if we are getting more members because of Zoom.

Other Zoom options: Claudia is getting together with friends she has known since 4th grade, they do a quick 2 minute per person catch up before starting their discussion.

Concluding Summary, Recommendations

New-member orientation - smaller zoom groups led by volunteers, a way to engage current members and make new members feel welcome

Zoom Capacity - Need to build zoom capacity through training for members

Invite participation - Don't always wait for people to volunteer

Involve new members - Distribute new-member contact info to committees, possibly from newsletter list

Encourage niche interest groups - Short term "pop-up" groups that in the current environment meet by zoom

Members who live away from Minnesota — Has UMRA actively publicized how easy it is to be part of zoom meetings to those members who live in other states?

Calendar - make comprehensive calendar on website clear and easy to use

Facilitate small group activities like walking

Maximize volunteer involvement - on line tutoring would be one example; might strengthen links to departments.