

**UMRA Retreat**  
**August 9, 2018**  
**Turnberry Hall, Midland Hills Country Club**  
**AGENDA**

- 8:30 Check-In, Coffee, Social Time
- 9:00-9:10 Overview of the Day
- 9:10-9:40 Ice-Breaker
- 9:40-10:15 State of the Association: Chip Peterson, Jerry Rinehart, John Anderson

*BREAK*

- 10:30 Key Issues for Exploration: Overview of each topic area and key issues within each:

- \*Advocacy (Donohue)
- \*Accessibility (Mann Rinehart)
- \*Communication (Parliament)

- 11:00 Begin small group discussion

11:30 *BREAK FOR LUNCH*

- 12:30 Resume Small Group Discussions of Topic Areas

- 1:30 Group Reports and Open Discussion

- 2:30 Wrap up: Where Do We Go From Here?

- 3:15 End

*Midland Hills Country Club*  
*2001 Fulham Street, Roseville, MN 55113*

## Advocacy Questions and topics

The following is a nonexclusive list of topics or questions for discussion by the advocacy group. We can add other topics and drop any of these topics. There will be an election of 4 regents in the next legislative session and the U will chose a new president both of which will substantially affect the U. In addition there has been a change in tax law which may eafect contributions and we may want to discuss if UMRA should try to promote and possibly sponsor some activities.

- 1. Contributions to the U.** Should UMRA promote donations to the U? Should UMRA establish a fund for a scholarship, fellowship or other project? Should UMRA hold a workshop on donations in light of the new tax law?
- 2. Regent Selection.** Should UMRA attempt to influence selection of regents by the legislature? Should UMRA promote a retiree candidate or candidates?
- 3. Legislative Appropriation for the U.** Should UMRA participate in supporting the U of M appropriation request to the legislature? How?
- 4. Selection of a new President.** Should UMRA be involved in the selection of the new president? How? Should UMRA honor the outgoing president in some way?

## Accessibility Questions and Topics

The primary activities of UMRA are the luncheon and speaker (8 events a year), workshops (6-8 per year), other meetings (UMRA committees, photography club, book club, and financial and legal issues interest group). This group will discuss what UMRA needs to do to assure that members can physically access these activities, and that the content of this programming is accessible.

**What are current barriers to the activities of UMRA?**

**What accommodations will make these events accessible?**

- Transportation?
- Locations?
- Technology?
- Other?

**What do you think of the following suggestions that have been made over the past several years?**

- Have presentations available on-line as a podcast or U-tube video?
- Provide opportunities for members to navigate alternate methods of transportation like Uber or Lyft?
- Provide an alternate site for luncheons or meetings (perhaps in Roseville or some centrally accessible site) for those who cannot easily get to the University?

**Other suggestions?**

## **Communications Area Questions**

The Communication and Outreach Committee wants to determine the allocation of limited resources in our effort to expand awareness of UMRA. The feedback from the following questions will help guide our future efforts.

1. How should UMRA's communications be used to raise our visibility and support our relationships with other U of M units? Which units should we target?
2. To more effectively communicate with current and potential members, should we explore the use of new technology i.e. bulletin boards, podcasts, Twitter, Facebook group, LinkedIn, or Instagram?
3. How are you currently using the UMRA website and what is one change you would like to see that would enhance your user experience?

**Thoughts for UMRA Prompted By/During Big 10 Conference**  
**Penn State University**  
**August 2018**  
**Jerry Rinehart/Bill Donohue**

At the conclusion of the Conference, Purdue's Don Gentry (2017 Conference Host) suggested three broad categories that seemed to capture much of the discussion: Recruitment and Retention; Relationships within the University; and Continuity of Leadership.

Below are our initial thoughts on UMRA in the context of these three areas, with additional thoughts in a fourth area—"Organizational Growth and Development."

We have also highlighted (in italics) issues that are consistent with the "Some Potential Issues for Next Year" section of the UMRA Synopsis (pp 5-6) included in the original retreat materials.

**Recruitment and Retention**

- Track OHR outreach to inform retirees of UMRA's existence and opportunities: (frequency of mailings? number retirees contacted per mailing?) Responses to mailings
- *Follow up with new members to encourage them to continue after their first (free) year*
- Encourage current members to reach out to individuals they know who are (or recently have) retired
- Continue adding and diversifying social/educational activities beyond the monthly meetings (see "Organizational Growth and Development" below)
- Ensure high quality of luncheon speakers and workshops
- Explore establishing some means of following societal/economic/political trends to enhance UMRA's awareness of the changing nature of retirees

**Relationships within the University**

- Continue building mutually beneficial relationships with UMAA and UM Foundation
- Enhance interactions with the Provost's office (e.g. initiate "update" meetings with Provost's key staff—Deb Cran, Ole Gram)
- Create inventory of retirement activities hosted by individual departments or colleges; determine if UMRA can assist in making them successful
- Create inventory of faculty/departments with research activities focused on aging related topics. As appropriate, engage these researchers in workshops and/or luncheons

### **Continuity of Leadership**

- Ask Committee Chairs/Interest Group Leaders to identify or at least put some thoughts together regarding their potential successors
- *Ensure annual reports of committee activities are submitted for the Archives*
- *Develop systematic orientation and apprenticeship programs for new officers and association leaders*

### **Organizational Growth and Development**

- *Ensure programs and activities are offered in facilities and locations that make some of them accessible across our membership*
- Explore opportunities for intergenerational learning activities (cf. Penn State Amy Lorek's work: *"Connecting generations: Learning, Working and Living"* (See "Recruitment and Retention" above))
- Identify areas/activities which could be pursued if external funding/sponsorships were available; then pursue the *sponsorships (e.g. financial support for professional services—newsletter and website coordination and production)*

## UMRA ANNUAL FINANCIAL REPORT

FY 2017 (9/1/16–8/31/17)

| FINANCIAL BALANCES | <u>9/1/16</u> | <u>8/31/17</u> |
|--------------------|---------------|----------------|
| Checking Account   | \$ 8,699      | \$10,748       |
| Savings Account    | <u>16,759</u> | <u>16,969*</u> |
| Total              | \$25,458      | \$27,717       |

### INCOME

|               |             |
|---------------|-------------|
| Dues          | \$12,015    |
| Luncheons     | 16,645      |
| Contributions | 2,395       |
| Bank Adj.     | <u>(14)</u> |
| Total         | \$31,041    |

### EXPENSES

|                               |          |
|-------------------------------|----------|
| Food(lunch,social,recpt.,Bd.) | \$17,435 |
| Newsletter                    | 6,766    |
| Assoc.Dues and Conferences    | 1,735    |
| Insurance                     | 788      |
| Planning (incl. survey)       | 635      |
| Memorials                     | 570      |
| Membership (copy & postage)   | 367      |

Administration

Gifts \$200

Candy 142

Copy & Sup 344

\$686

686

Total

\$28,992

NET (Income-Expenses)

\$ 2,049

\* This includes \$208 deposited from a now closed old checking account

-- Carl Adams, UMRA Treasurer

# **UMRA Member Profile**

June 2018

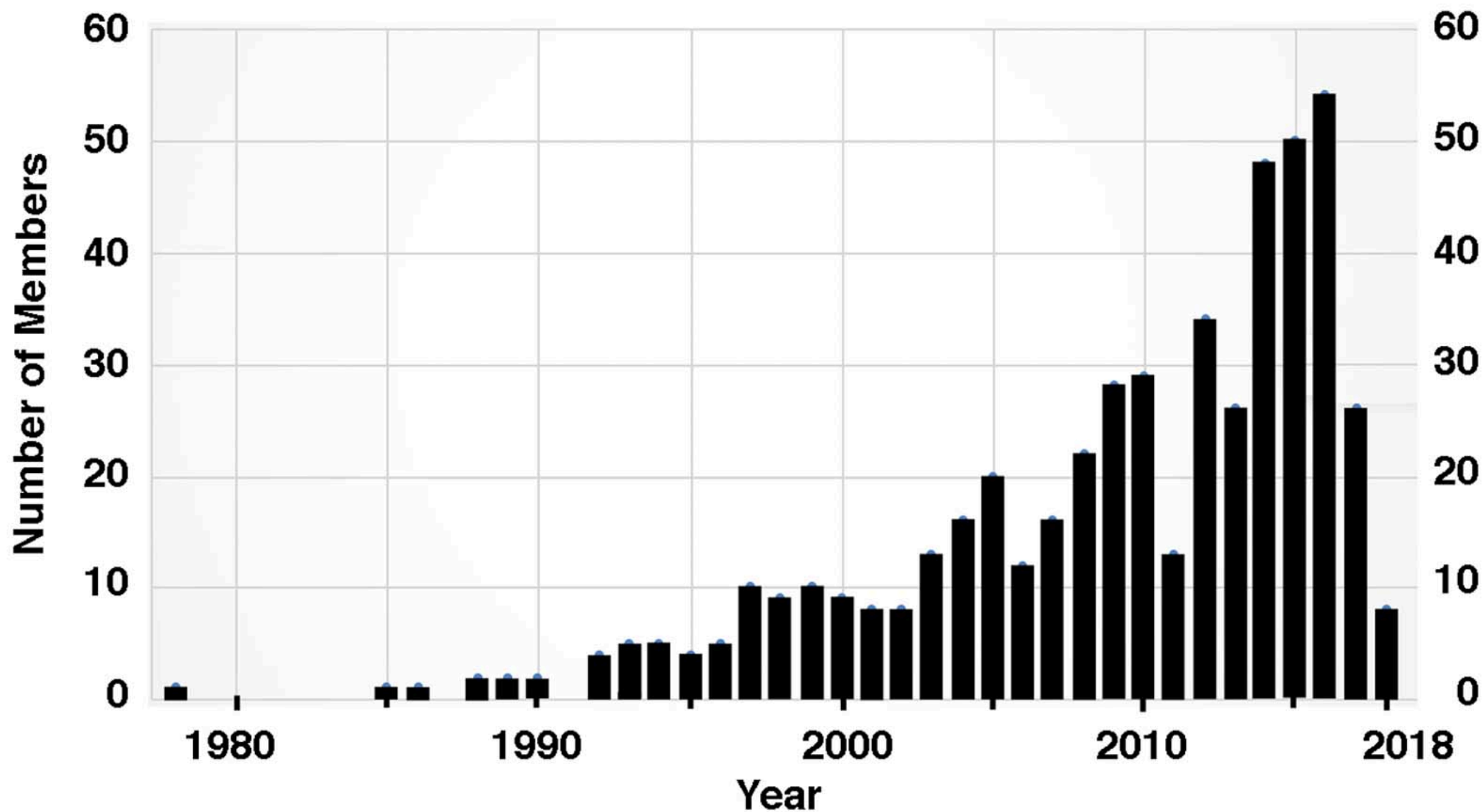
Prepared for August 9 Retreat



## Affiliation of Members Prior to Retirement

| <u>College or Unit</u> | <u>Number</u> | <u>College or Unit</u> | <u>Number</u> |
|------------------------|---------------|------------------------|---------------|
| CLA                    | 90            | Univ Services          | 9             |
| Med Sch                | 66            | Extension              | 8             |
| Admin                  | 41            | CCE                    | 7             |
| CSE                    | 41            | Nursing                | 6             |
| CEHD                   | 33            | Pharmacy               | 6             |
| CFANS                  | 24            | Humphrey               | 5             |
| Libraries              | 21            | Vet Med                | 4             |
| Student Affairs        | 19            | Duluth                 | 3             |
| CBS                    | 16            | Foundation             | 3             |
| Public Health          | 16            | Grad Sch               | 3             |
| CSOM                   | 15            | Law                    | 3             |
| Design                 | 13            | Athletics              | 2             |
| Dentistry              | 10            | Crookston              | 2             |
| AHC Admin              | 9             | Morris                 | 2             |

# Year Joined UMRA



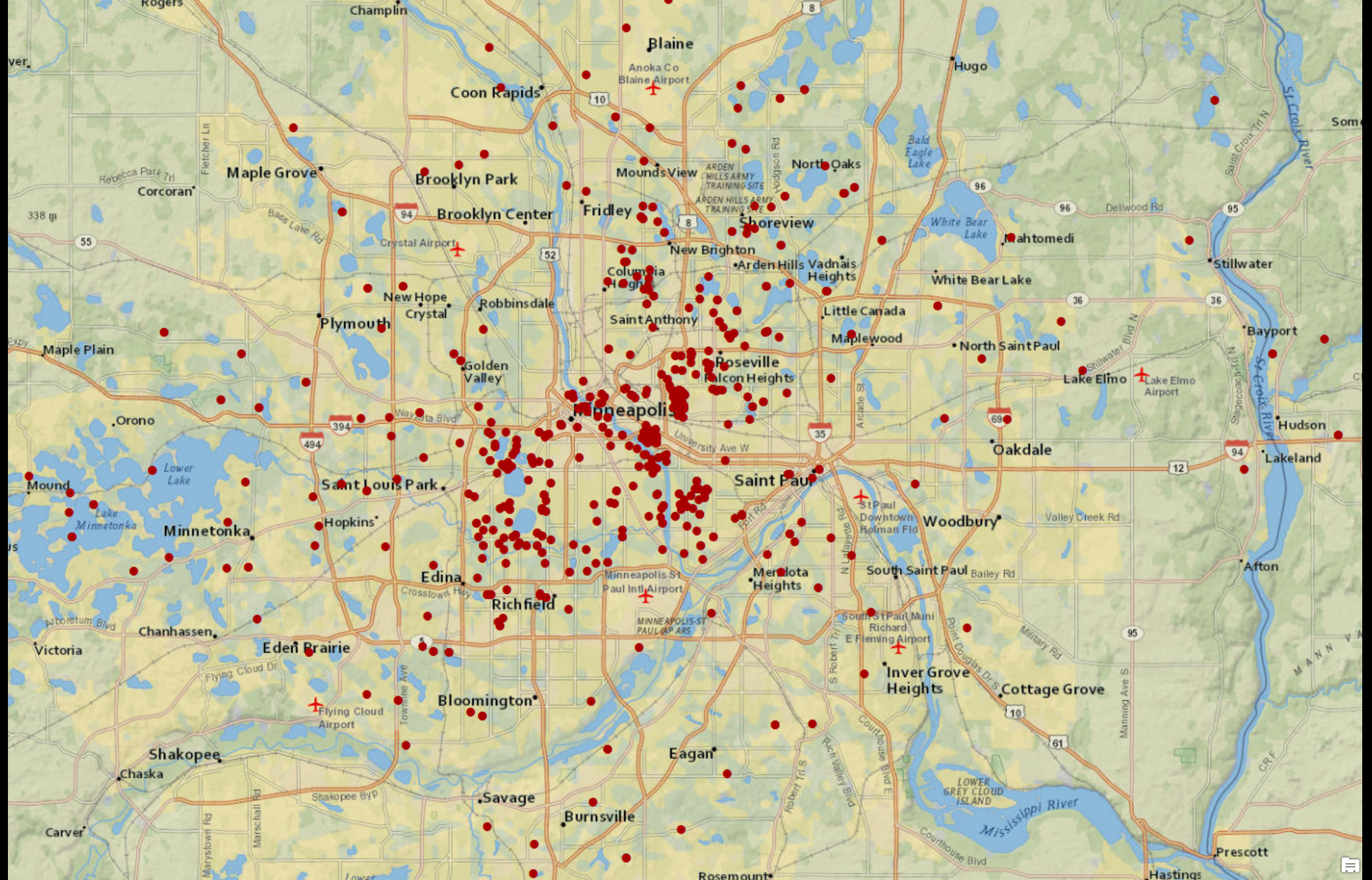
## **Residence of UMRA Members**

**20 members have out-of-state addresses:**

**AR      CA      IA      MA      MI  
      NM      OR      TX      WA**

**5 have outstate-Minnesota addresses**

**All the rest are in the Twin City metro area  
(includes Hudson, WI)**



# **Luncheon Participation**

**For the past year's 8 luncheon/reception events:**

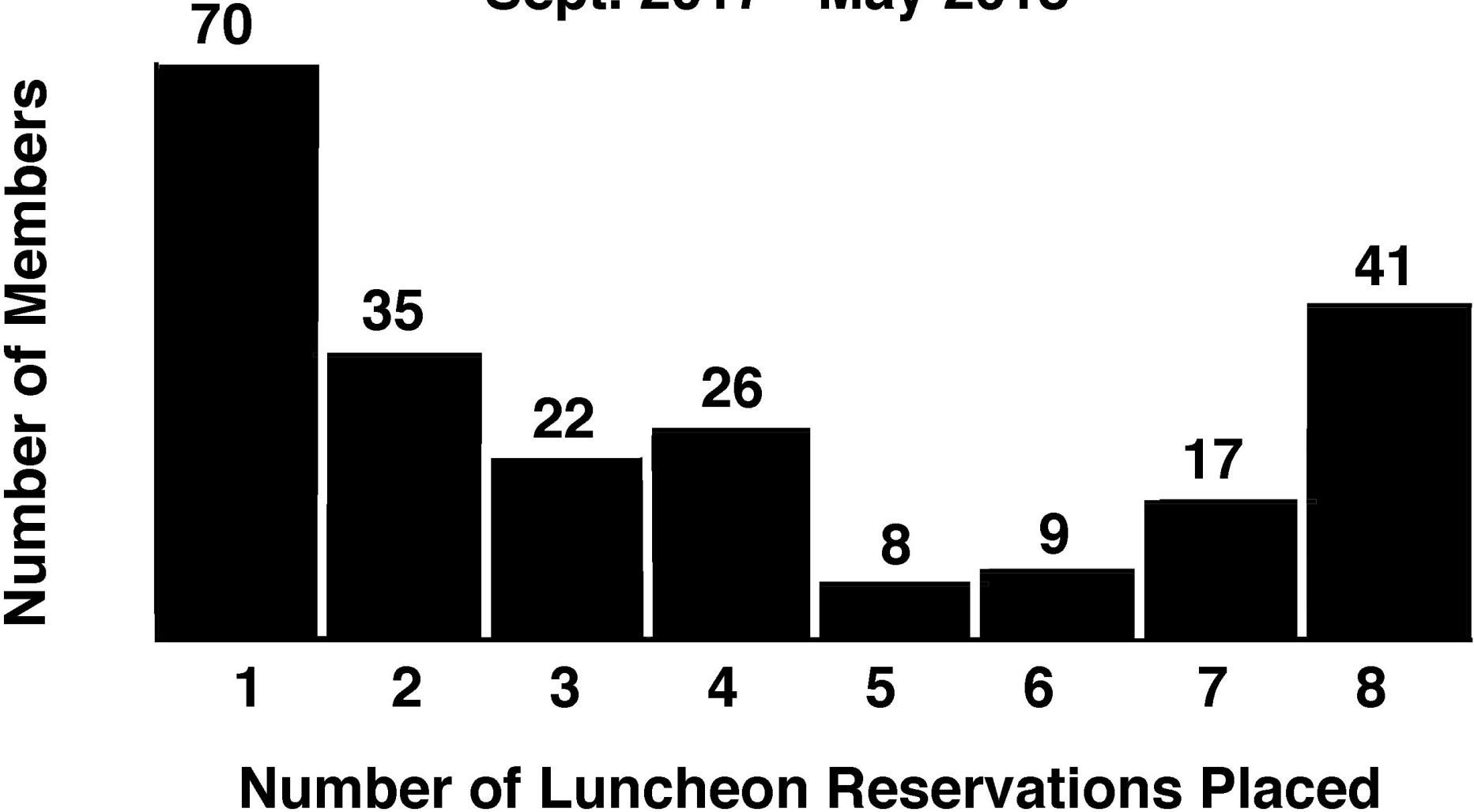
**228 members made a reservation**

**552 members as of June 2018**

**41% placed a reservation**

# Frequency of Reservation Placement

Sept. 2017 - May 2018



# **Parking Discount Coupon Distribution**

**Since May 2017**

**4000 coupons obtained from PTS**

## **Methods of Distribution**

- At luncheons**
- With membership renewal mailings**
- Response to requests by mail from 44 members**
  - 11 members, 382 coupons, attend luncheons**
  - 33 members, 1684 coupons, do not attend**

6/30/18

## **Proposals for Two Projects for the UMRA Cares Committee & Two Document Updates**

### Table of Contents

Page 2: (1) Proposal for UMRA Support Activities for Members 80+

Page 6: (2) Proposal for an UMRA Caregiver Project to Evaluate Long Term Care

Page 10: (3) Revised Cares Committee Report - June 26, 2018

Page 12: (4) Copy for revisions of static portion of UMRA Cares Comm. webpage

### **Synopsis of the Proposals**

The University of Minnesota Retiree Association (UMRA) for five years has had a Cares Committee that works on analyzing, promoting and providing caregiving and related activity. It's most visible project is the development of up to eight 1-hour workshops throughout the academic year. Another high visibility project is the Remembrance project, which searches through obituary databases in order to identify the passing of any members or their spouses. Then condolences are sent to the families of any such cases or losses.

Two new projects have been suggested for the Cares Committee and they are summarized in sections (1) and (2) of this report. One proposal is to establish UMRA social events for those 80 or older. Recognizing that many older members find it difficult to get to meetings at the Campus Club, meetings will be held in the meeting rooms of community libraries. Hopefully, transportation and other services can be provided as needed. A central goal is to improve the quality of life of our members, especially our older members. The idea for this project came from Helen Carlson.

The other project is to help our members in deciding whether to use outside help or institutional facilities for some or all of the caregiving needed by a family member. The major task will be to assemble information about LTCF (Long Term Care Facilities) in order to reduce the burden of finding the best care facilities and choosing the best alternative. The idea for this project came from Amy Sheldon.

Sections 3 and 4 of this document offer updates of existing documents. Section (3) is the latest UMRA Cares Committee report. And section (4) is an update of the UMRA webpage for the Cares Committee.

### **To Members of the UMRA Cares Committee**

You received these documents because you are a member of the Cares Committee. I have prepared them because there are forces that seek to undermine and render the Committee ineffective and unimportant within UMRA. This puts the Committee and what we are doing at risk. Among other things, the Committee needs to initiate more projects and services as a survival strategy. Perhaps more importantly, many UMRA members need help in their role as caregiver and we as a Committee need to help connect them to support services.



## **(1) Preliminary Proposal for UMRA Support Activities for Members Aged 80+**

### **The Nature & Needs of the Aging in America**

During the last Century, life-expectancy in the United States increased by 30 years. Data from the U.S. Census in 2016 reveal that the population of those over 65 declines due to mortality until age 85. After age 65, about half the population passes on every 10 years due to mortality. But after age 85 the death rate slows down; if you reach age 85, you have a better chance of staying alive for a while. Interestingly, among those alive after age 85 in the USA, women outnumber men by two to one.

Recent studies of seniors in America include the huge National Health and Aging Trends Study (NHATS) of unmet needs of older adults. This 2011 study compared needs for assistance of various groups of the elderly. The NHATS was built upon interviews of 8,000 persons over age 65. Their 2014 report established that about half of the seniors in the USA said they needed assistance in one or more of the following areas (Freeman & Spillman 2014):

- Transport for healthcare, shopping, etc.
- Daily activities such as getting dressed, bathing, use of toilets, etc.
- Assistive devices needed for personal health
- Post-hospital disability and rehabilitation services
- Insomnia and other non-life-threatening health needs
- Household chores: cooking, paying bills, cleaning
- Coping with Ageism without harming self
- Managing medications and healthcare treatment

The NHATS study found that a large majority of the elderly continue to live in their own homes. And about half of them had serious difficulties with one or more of activities listed above. About 20% of these individuals received assistance from a caregiver. A third of those without a caregiver reported at least one “adverse consequence” of not having specific assistance in the past month. Thus, many over age 65 went without needed assistance, leading to depression and other serious consequences.

Despite these living patterns, the elderly do not follow the same trajectories in terms of injuries, diseases, and disabilities. Because the “mortality track” varies so much, some researchers use analytical methods of “paths” rather than age cohorts or groups. Two such analytic projects include a book by Meika Loe (2011), *Aging Our Way: Lessons for Living from 85 and Beyond*. and Howard Friedman and Leslie Martin’s (2011) book, *The Longevity Project: Surprising Discoveries for Health and Long Life from the Landmark Eight-Decade Study*.

### **Older UMRA Members and their Needs**

It is possible that a large portion of UMRA members have unmet needs for the kinds of assistance required by the national population of seniors. However, the level of unmet need for assistance in daily living may be less problematic than the general American public. In order to resolve this question, we propose to try to identify those UMRA members that are challenged by these problems.

A limitation of the UMRA member records is that they don't include birth year, however, they do include the year of first joining UMRA. From that information we have been able in the past to recognize those who had been members the longest; and in 2012 UMRA gave special awards to 5 members who had had not only been part of UMRA the longest but were probably the oldest in age as well.

To see what data might be useful, we sorted the 2016 membership directory and took only those who had joined in year 2000 or earlier. The file is attached as the appendix, and as you can see it contains about 80 members, most or all of whom probably were

age 80+. (A 65 year old joining in 2001 would be 82+ now.) A next step will be to get the latest member file from Virgil Larson to create an up-to-date list from a more recent directory. A major advantage of such a list is that it has phone numbers as well as addresses and home department at the U for most members.

Our plan for the project will be select two sites in the Twin Cities with a high concentration of UMRA members over age 80 to hold social support events. From a review and analysis of UMRA members who joined before the year 2000, we have identified two locations with a high density of members likely to be over 80. These two locations are (1) State Legislative District 66A located at Roseville and nearby Saint Paul neighborhoods, and (2) State Legislative Districts 60B and 61A in South Minneapolis. At least 25 to 30 UMRA members over 80 reside in the Roseville area and 15 to 20 in South Minneapolis communities.

The main purpose of our proposed activities is to determine to what extent our elderly members suffer from the problems listed above from the 2014 study. The first step will be to plan one or two events and agree on a venue, probably a community room of a branch library in each of these two neighborhoods. However, the meeting room at 1666 Coffman might be feasible in Roseville. Then, calls will be made to all UMRA members in the 80+ age category living in these two neighborhoods. Initially, UMRA Cares Committee members, and other volunteers, will be used to make the calls. In future years, hopefully funds would be available to hire students to make some of the calls, and help provide transportation to the social event.

Over half of the UMRA Cares Committee members were also trained as Care Guides. They will be expected to contact and offer to help the older retirees and offer to help them deal with later life and its burdens. In planning these events, we expect to get some guidance from Joe Gaugler, Long Term Care Chair, and his staff at the Center for Aging.

In addition to caring for the needs of the oldest members of UMRA, the proposed activities will be expanded to encourage the oldest members to remain involved with UMRA activities and with other members. For example, the Cares Committee might provide birthday wishes each year and arrange for various types of social activities, as well as transportation to UMRA events for older members. Most of the older members are not able to attend the UMRA events in the Campus Club, due to their declining physical health. A major aim of the new set of activities is to keep members connected to other retirees and involved with important social activities such as UMRA, to maintain healthy well-being.

After approval and support of the Cares Committee and the UMRA Board, a team from the Cares Committee will work to implement a pilot project this coming year. The latest membership data will be used to locate the best venues for holding support group gatherings of UMRA members 80+ years and older.

The remaining planning needed for this project will decide when to start and how often to have social gatherings in the core communities of UMRA members over 80. Tentatively, the social gatherings will be held during the summer on a week day, probably between 2:00 to 3:30pm.

Locations to be selected would necessarily be handicap accessible, have ample at-door parking, and readily available via Metro-Mobility or a city bus. The meeting room would need to be handicap accessible and a place with good acoustics.

We also will attempt to ensure that most gatherings provide snacks and non-alcoholic liquid refreshments. Each gathering also will have a discussion group leader and, in some instances, a guest speaker. Participants will be encouraged to tell about every day and ongoing joys and pains, as well as how their years working at the University relate to the present day and the meaning of their current existence. One occasional topic for discussion will be: How can UMRA best honor and support elder members? After gatherings, leaders will evaluate and summarize the experience, periodically sharing this with the Cares Committee and Board. Depending upon the apparent benefits for the participants, such gatherings could be expanded to more neighborhoods.

## References

- Freeman, V. A. & Spillman, B. C. (2014). Disability and Care needs among Older Americans. *The Millbank Quarterly*. 94(3), Pp. 509-541.
- Friedman, H. & Martin, L. (2011). *The Longevity Project: Surprising Discoveries for Health and Long Life from the Landmark Eight-Decade Study*. NYC: Hudson Street Press.
- Loe, M. (2011). *Aging Our Way: Lessons for Living from 85 and Beyond*. Oxford, UK: Oxford Univ. Press.

## Appendix

Table 1a. UMRA Members who Joined before 2000, Part 1 –

Highlighted Rows Identify those Living in the Greater Roseville area

| #  | pl/S | Last       | first        | city           | state | Zip   | iew Distric | Type        | ate joined |
|----|------|------------|--------------|----------------|-------|-------|-------------|-------------|------------|
| 1  | 1    | Caldecott  | Richard S.   | Stillwater     | MN    | 55082 | 39A         | Faculty     | 1/1/1989   |
| 2  | 2    | Gordon     | G. Kenneth   | St. Paul       | MN    | 55104 | 64          | Faculty     | 1/1/1999   |
| 3  | 1    | Schwanke   | Robert W.    | St. Paul       | MN    | 55105 | 64B         | Faculty     | 1/1/1992   |
| 4  | 2    | Staba      | E. John      | Falcon Heights | MN    | 55108 | 66A         | Faculty     | 1/1/1996   |
| 5  | 1    | Walbel     | Mary C.      | St. Paul       | MN    | 55108 | 66A         | Spouse      | 1/1/1997   |
| 6  | 1    | Tester     | John R.      | St. Paul       | MN    | 55108 | 66A         | Faculty     | 1/1/1999   |
| 7  | 2    | Hobbie     | Russell      | Falcon Hts     | MN    | 55108 | 66A         | Faculty     | 1/1/1998   |
| 8  | 1    | Watson     | Marion E.    | St. Paul       | MN    | 55108 | 66A         | Faculty     | 1/1/1988   |
| 9  | 1    | Wark       | Dr. David M. | St. Paul       | MN    | 55108 | 66A         | Faculty     | 1/1/1995   |
| 10 | 1    | Blair      | Kay W.       | St. Paul       | MN    | 55108 | 66A         | Spouse      | 1/1/1990   |
| 11 | 2    | Jensen     | Vernon       | St. Paul       | MN    | 55108 | 66A         | Faculty     | 1/1/1993   |
| 12 | 1    | Stauffer   | Lee D.       | Falcon Heights | MN    | 55108 | 66A         | Faculty     | 1/1/1993   |
| 13 | 2    | Howe       | John         | St. Paul       | MN    | 55108 | 66A         | Faculty/Civ | 1/1/1999   |
| 14 | 2    | Quie       | Paul         | St. Paul       | MN    | 55108 | 66A         | Faculty/P&A | 1/1/1999   |
| 15 | 2    | Sederberg  | Charles H.   | St. Paul       | MN    | 55108 | 66A         | Faculty     | 1/1/1997   |
| 16 | 2    | Folden     | Richard      | Maplewood      | MN    | 55109 | 43A         | P&A         | 1/1/1994   |
| 17 | 2    | Radcliffe  | Edward B.    | Little Canada  | MN    | 55109 | 42B         | Faculty/CS  | 1/1/1998   |
| 18 | 1    | Fletcher   | Teena        | Mounds View    | MN    | 55112 |             |             | 1/1/1988   |
| 19 | 1    | Minnick    | Janice R.    | New Brighton   | MN    | 55112 | 0           |             | 1/1/1992   |
| 20 | 1    | Linck      | Vandora G.   | Arden Hills    | MN    | 55112 | 42B         | Spouse      | 1/1/1994   |
| 21 | 1    | Hanson     | Bernice V.   | St. Paul       | MN    | 55112 | 41B         |             | 1/1/1993   |
| 22 | 1    | Stuewer    | Roger H.     | New Brighton   | MN    | 55112 | 41B         | Faculty     | 1/1/2000   |
| 23 | 2    | Mohn       | Carl A.      | Arden Hills    | MN    | 55112 | 42A         | Faculty     | 1/1/1997   |
| 24 | 1    | Johnson    | Marilyn E.   | Mounds View    | MN    | 55112 | 41B         | P&A         | 1/1/1994   |
| 25 | 1    | Rempel     | Leola        | Roseville      | MN    | 55113 | 66A         | Faculty     | 1/1/1992   |
| 26 | 2    | Hartup     | Willard      | Roseville      | MN    | 55113 | 66A         | Faculty     | 1/1/1997   |
| 27 | 1    | Perman     | Virginia     | St. Paul       | MN    | 55113 | 66A         |             | 1/1/2000   |
| 28 | 1    | Caldwell   | Elwood       | Roseville      | MN    | 55113 | 66A         | Faculty     | 1/1/1989   |
| 29 | 1    | McFarland  | Mary Ellen   | Roseville      | MN    | 55113 | 66A         | Faculty     | 1/1/1989   |
| 30 | 1    | Czarnecki  | Dr. Caroline | Roseville      | MN    | 55113 | 66A         | Faculty     | 1/1/1992   |
| 31 | 1    | Marten     | Lynette      | Roseville      | MN    | 55113 | 66A         | CivilS      | 1/1/1997   |
| 32 | 1    | Busta      | Francis F.   | Roseville      | MN    | 55113 | 66A         | Faculty     | 1/1/1999   |
| 33 | 2    | Ruschmeyer | Orlando      | St. Paul       | MN    | 55113 | 66A         | Faculty/Civ | 1/1/1991   |
| 34 | 1    | Barber     | Shirley L.   | Roseville      | MN    | 55113 | 66A         | P&A         | 1/1/2000   |
| 35 | 1    | Vik        | Mary J.      | St. Paul       | MN    | 55116 | 64B         | CivilS      | 1/1/1990   |
| 36 | 1    | Keenan     | Kathleen M.  | St. Paul       | MN    | 55116 | 64B         | Faculty     | 1/1/1998   |
| 37 | 2    | Kagan      | Alan         | West St. Paul  | MN    | 55118 | 52A         | Faculty     | 1/1/1997   |
| 38 | 1    |            | Maja         | West St. Paul  | MN    | 55118 | 52A         | Faculty     | 1/1/2000   |
| 39 | 1    | Pfender    | Warren W.    | Maplewood      | MN    | 55119 | 53A         | Faculty     | 1/1/1986   |
| 40 | 1    | Roberts    | Mary C.      | Oakdale        | MN    | 55128 | 43B         |             | 1/1/2000   |
| 41 | 1    | Combs      | Barbara A.   | Chanhausen     | MN    | 55317 | 33B         |             | 1/1/1995   |

Table 1b. UMRA Members who Joined before 2000, Part 2 –  
 Highlighted Rows Identify those Living in the Greater Roseville area

| #  | pl/S | last       | first       | city          | state | Zip   | view Distric | Type       | ate joined |
|----|------|------------|-------------|---------------|-------|-------|--------------|------------|------------|
| 42 | 1    | Last       | Cyrus F.    | Excelsior     | MN    | 55331 | 33B          | Faculty    | 1/1/1990   |
| 43 | 1    | Smythe Jr. | Betty B.    | Excelsior     | MN    | 55331 | 33B          | Spouse     | 1/1/1989   |
| 44 | 1    | Slater     | Bernadine   | Burnsville    | MN    | 55337 | 51A          | Faculty    | 1/1/2000   |
| 45 | 1    | Feldman    | Leland M.   | Eden Prairie  | MN    | 55344 | 49B          |            | 1/1/1995   |
| 46 | 1    | Pearson    | Jeanne H.   | Wayzata       | MN    | 55391 |              | Scientist  | 1/1/1992   |
| 47 | 1    | Larson     | William E.  | Deephaven     | MN    | 55391 | 33B          | Faculty    | 1/1/1993   |
| 48 | 1    | Wright     | Ann M.      | Minneapolis   | MN    | 55401 | 59B          | Faculty    | 1/1/1998   |
| 49 | 1    | Erickson   | Sally E.    | Minneapolis   | MN    | 55403 | 61A          | P&A        | 1/1/1998   |
| 50 | 1    | Howard     | David C.    | Minneapolis   | MN    | 55403 | 61A          | Faculty    | 1/1/1998   |
| 51 | 1    | Johnson    | Cecil J.    | Minneapolis   | MN    | 55405 | 61A          | Faculty    | 1/1/1996   |
| 52 | 2    | Waddington | Marian Orto | Minneapolis   | MN    | 55405 | 60A          | Faculty    | 1/1/1996   |
| 53 | 1    | Bagley     | Urve B.     | Minneapolis   | MN    | 55406 | 63A          | CivilS     | 1/1/2000   |
| 54 | 1    | Dagle      | Virginia M. | Minneapolis   | MN    | 55406 | 60B          | CivilS     | 1/1/1994   |
| 55 | 1    | Provencher | Roger B.    | Minneapolis   | MN    | 55406 | 59A          |            | 1/1/1999   |
| 56 | 1    | Martin     | Frances B.  | Minneapolis   | MN    | 55406 | 63A          | Spouse     | 1/1/1978   |
| 57 | 1    | Paulu      | Eugene I.   | Minneapolis   | MN    | 55407 |              | Civil S    | 1/1/1996   |
| 58 | 1    | Edie       | Victoria P. | Minneapolis   | MN    | 55408 | 61A          | Spouse     | 1/1/1996   |
| 59 | 1    | Wilson     | Gerhard H.  | Minneapolis   | MN    | 55410 | 61A          | Faculty    | 1/1/1998   |
| 60 | 1    | Weiss      | Corrie W.   | Minneapolis   | MN    | 55414 | 60B          | Spouse     | 1/1/1989   |
| 61 | 2    | Beck       | Arvonne S.  | Minneapolis   | MN    | 55414 | 60B          | Sr. Fellow | 1/1/1994   |
| 62 | 2    | Fraser     | Walter H.   | Minneapolis   | MN    | 55414 | 60B          | Faculty    | 1/1/1993   |
| 63 | 1    | Johnson    | Minnie      | Minneapolis   | MN    | 55414 | 60B          | P&A        | 1/1/1988   |
| 64 | 2    | Matsuura   | Richard     | Minneapolis   | MN    | 55414 | 60B          | Faculty    | 1/1/1998   |
| 65 | 1    | Kaln       | Jane A.     | Minneapolis   | MN    | 55414 | 60B          | Spouse     | 1/1/1997   |
| 66 | 2    | Starr      | Frank H.    | Minneapolis   | MN    | 55414 | 60B          | Faculty    | 1/1/1995   |
| 67 | 1    | Wood       | G. Mary     | Minneapolis   | MN    | 55414 | 60B          | Faculty    | 1/1/1996   |
| 68 | 1    | Bradley    | Harlan      | Minneapolis   | MN    | 55414 | 60B          | Faculty    | 1/1/1996   |
| 69 | 1    | Hansen     | Albert K.   | St. Louis Pk. | MN    | 55416 | 46B          | Faculty    | 1/1/1986   |
| 70 | 1    | Wickesberg | Dallis K.   | Golden Valley | MN    | 55416 | 46A          | Faculty    | 1/1/1996   |
| 71 | 1    | Perry      | Frank R.    | Minneapolis   | MN    | 55416 | 61A          | Faculty    | 1/1/1993   |
| 72 | 1    | Braun      | Shirley     | St. Louis Pk. | MN    | 55416 | 46B          | Faculty    | 1/1/2000   |
| 73 | 2    | Zimmerman  | Donald G.   | St. Anthony   | MN    | 55418 | 41B          | CivilS/Fac | 1/1/1992   |
| 74 | 1    | Gullickson | Dorothy C.  | Minneapolis   | MN    | 55418 | 60A          | Faculty    | 1/1/1994   |
| 75 | 1    | Bohn       | Mary L.     | Minneapolis   | MN    | 55421 | 41B          | Faculty    | 1/1/1996   |
| 76 | 2    | Young      | Theodore    | St. Louis Pk. | MN    | 55424 | 46B          | Faculty    | 1/1/1997   |
| 77 | 1    | Galambos   | Bright M.   | Edina         | MN    | 55424 | 49A          | Faculty    | 1/1/1998   |
| 78 | 2    | Dornblaser | Theodor J.  | Minneapolis   | MN    | 55426 | 46B          | Faculty    | 1/1/1999   |
| 79 | 1    | Litman     | Grace Mary  | Minneapolis   | MN    | 55435 | 49B          | Faculty    | 1/1/1982   |
| 80 | 1    | Ederer     | Dr. Seymou  | Edina         | MN    | 55435 | 49B          | Faculty    | 1/1/1996   |
| 81 | 2    | Handler    | Dennis D.   | Bloomington   | MN    | 55438 | 49B          |            | 1/1/2000   |
| 82 | 1    | Johnson    | Constance   | Edina         | MN    | 55439 | 49A          |            | 1/1/1990   |
| 83 | 1    | Orlani     | Joseph W.   | Grand Rapids  | MN    | 55744 | 05B          | Faculty    | 1/1/1991   |
| 84 | 1    | Rust       | Laird H.    | Alexandria    | MN    | 56308 |              | Faculty    | 1/1/1994   |

6/26/18

## **(2) Proposal for an UMRA Caregiver Project to Compile Information on Long Term Care Facilities (LTCF) in the Twin Cities**

### **Abstract**

Informal caregiving is a critical role that nearly one in ten Minnesota adults provides free of charge for one or more family members. For about one fifth of the caregiving recipients, more intensive, skilled care is needed. Our challenge is that most UMRA members needing institutionalized care have no training in evaluating and selecting a care facility. Part of the problem is that Minnesota does not have a complete evaluation scheme for care facilities. The Cares Committee proposes to assemble reports, data and other information with the intent of preparing a guide to reviewing and selecting a care facility. This initiative will take advantage of our “Care Guide” program.

### **Background and Context**

Currently, 4.8 million adults over age 17 live in Minnesota and according to the Wilder Research project on Caregiving (Wilder 2012), almost 600 thousand serve as unpaid, informal caregivers. They also found that 86% of all adults serve as a primary or secondary caregiver during their lifetime. They found that over half of the Minnesota informal caregivers provided each of the following types of care: companionship, shopping, transportation, paperwork, housekeeping, cooking, managing finances, managing household repairs, assistance in obtaining healthcare, and help with personal activities.

From 2012 to the present, the UMRA Board, and later the UMRA Cares Committee, administered a workshop series called “Living Well in Later Life.” Under Earl Nolting’s leadership, a “Care Guides” program was launched in 2015. The program started with the training of nine UMRA members to assist other members who needed to make decisions regarding placement of a family member or other loved in a care facility. The training program relied on the leading text of this subject: *The Good Caregiver: A One-of-a-Kind Compassionate Resource for Anyone Caring for an Aged Loved One* by Dr Robert Kane.

Hundreds of books have been written on the concept of caregiving, but Dr. Kane’s book, *The Good Caregiver*, probably is the most practical and useful for someone who works in that role or is considering the role of caregiver. Not only is it an excellent text on procedures, but it shines as a resource guide. It has been made even more useful by a huge and invaluable website, which is a workbook of ideas and assessment tools for beginning and navigating through home-based caregiving: <http://ltc.hsr.umn.edu/>

This website built by Professor Kane, called “Long Term Care: You Decide,” was developed under his direction as a teaching aid and a supplement to the use of his book as a textbook. Robert Kane, a true academic, wrote/published 34 books and 506 research articles. And yet he was able to develop this very practical book and website for the general public.

Bob Kane has a special connection to UMRA. He served many years as an informal consultant and he gave the April 2015 luncheon speech in which he gave us a capsule of *The Good Caregiver*. In 2016 and 2017, he not only taught the Care Guides seminar for UMRA volunteers but he led a workshop on the future of long term care.

The UMRA Cares Committee in 2018 arranged for help from Professor Joseph Gaugler, now the Robert L. Kane Endowed Chair in Long-Term Care and Aging in the School of Public Health at the University of Minnesota. His research continues to examine and address the effectiveness of community-based and psychosocial services for those of advanced age.

## Compiling & Disseminating Information on LTCF in the Twin Cities

In the interest of providing support for UMRA members who now and in the future will work as informal caregivers, the first compilation of information will be evaluation data on LCTFs. The UMRA Care Guides will help other UMRA members interpret the data and make the wisest decisions regarding the delivery of services in connection with the family member(s) that need help making decisions on the use of LCTFs for their family member that potentially needs caregiving services from a LCTF. This group would share and discuss challenges of providing care for family and friends in need. It will not provide training or medical advice, but will offer opportunities for sharing and discussing issues. If there is interest, an UMRA caregivers support group will be formed to share experiences and to read and discuss relevant books like Olivia Hoblitzelle's *Ten Thousand Joys and Ten Thousand Sorrows: A Couple's Journey Through Alzheimer's*; Beth McLeod's book *Caregiving*; and Meika Loe's book: *Aging Our Way*.

In Professor Kane's book, *The Good Caregiver*, he stresses that the care needs for rapidly aging persons are so complex that most informal caregivers cannot do it alone. Rather than move the ailing elderly family member to an institutionalized facility, the best decision initially may be to hire people to help at home with daily living, household chores, and care management. The latter refers to professional "care managers" who can be hired to help make care-related decisions. Such care managers sometimes charge an hourly rate, while others may be already employed by a caregiving agency helping families with these decisions. Kane describes how to use care managers in chapter 9 of his book. Another very important source of help is the Minnesota Office of Ombudsman for Long-Term Care. See <http://www.mnaging.org/Advocate/OLTC.aspx>

In chapter 10, Dr. Kane outlines the different types of care. LTCFs, some of which offer the most intensive services available, include:

- 1) Skilled Nursing Facilities (SNF);
- 2) Rehabilitation units, in which people with injuries or post-surgery can receive care;
- 3) Memory care units for persons with advanced Alzheimer's or related diseases;
- 4) Independent Living, apartments that do not include treatment services, but at which occupants can buy services from other types of units in the Facility;
- 5) Hospice and Palliative Care Units; and
- 6) CCRC (Continuum of Care Retirement Communities), a type of facility that offers a range of services that typically include two or more types of services. If the LTCF includes several of the first five types of service delivery units, then the facility is probably best called a CCRC. It gets this name from the fact that the services offered can be viewed as a continuum starting with independent living, then as needed, moving to facilities like assisted living that provide services, and finally a facility such as a SNF that provides most remaining kinds of health services for elders as needed.

For those that chose to remain living at home, there are two principle services: home health care, and day care. The latter option consists of transporting the person needing help to an institution on a daily basis. Most other options involved bringing someone to help into the home.

In Minnesota, the State Department of Health provides an evaluation system for Skilled Nursing Facilities (SNF), which is called a Nursing Home Report Card (<http://nhreportcard.dhs.mn.gov/>). The Department has been working on a report card for Assisted Living for over five years. They also at one time were working on a Memory Care Report Card, which is intended for those with Alzheimer's and related

forms of Dementia or memory disorder. So far, nothing evaluative has been released as an Assisted Living Report Card. However, at the website: <http://www.mnaging.org/Advisor/HCBS.aspx> you can find a search tool that gives descriptive information such as address and types of services offered by each Assisted Living Center. Presumably rankings and other “report card” information will be added at some time in the future. According to their State Health Department directory database, Hennepin County has 1,073 such facilities and Ramsey County has 476. Some are nonprofits and some are for-profit.

### **UMRA Caregiving Data Collection Project**

In our proposed project, we will talk first to key persons with the Minnesota Board of Aging and others involved in the Report Card projects. Then we will contact experts in elder care such as the leaders of the Wilder Caregiving Services division.

The third step will be to review the MN Department of Health’s classifications of each facility to determine a smaller set of LTCFs that should be reviewed more closely, perhaps with site visits. Included in this list would also be those facilities that are either the most popular or perceived as the best. Final selection of LTCFs from which to gather more detailed information from site visits will be determined by interviewing two groups of experts. One will be University of Minnesota faculty who are working on LTCF-related project. Among those to be contacted are the following:

1. School of Public Health Professor [Rosalie Kane](#) is currently doing research on the quality of nursing home care and homecare, services allocation, and evaluation of residential models that serve disabled elderly people. She is also director of the Long Term Care Resource Center at the Center for Aging.
2. School of Public Health Professor [Joseph Gaugler](#), PhD, holding the Robert L. Kane Endowed Chair in Long-Term Care (LTC) and Aging has several project working on family decision making for LTCFs.
3. School of Public Health Professor [Timothy Beebe](#), also Mayo Professor and Division Head, Division of Health Policy and Management: His research focuses on patient-reported outcomes measurement, developing and testing health measures, health care policy, and health care access for vulnerable populations.
4. School of Public Health Associate Professor [Tetyana Shippee](#): A study of the effectiveness of care guides for those potentially requiring palliative care.
5. Assistant Professor [Katie White](#) has been conducting a study of how families deal with an aging family member with serious illnesses.
6. School of Public Health Associate Professor, [Leslie Grant](#), specializes in delivery of long-term care and program evaluation. His current research is on organizational innovation and quality improvement in long-term care and the use of tele-health services.

In addition, one or more of us will attend the conferences in the Twin Cities where experts in LTCF are likely to attend. Foremost among these conferences are (1) The Fall Aging Conference on October 24, and (2) The Reimagining Aging Conference on October 17. At these conferences will be care managers that we can either interview on the spot or arrange for a later interview.

Concurrently, the project will search for UMRA members who have been involved in a family decision to place a member in a LTCF site. We already know some of these members who can serve as informants, if not experts, on issues related to the LTCF placement decision.

The Cares Committee has already scheduled a workshop on LTCF for January 2019, so the proposed project will have a chance to release a preliminary report as well as advise UMRA members on how to prepare for making decisions on placing a family member in such a facility. Any such reports will be summarized on an UMRA Caregivers webpage with links to the full reports.

### **References**

- Hoblitzelle, O. A. (2010). *Ten Thousand Joys and Ten Thousand Sorrows: A Couple's Journey Through Alzheimer's*. NY: Penguin Group.
- Loe, M. (2011). *Aging Our Way: Lessons for Living from 85 and Beyond*. Oxford, UK: Oxford Univ. Press.
- Kane, R. (2011). *The Good Caregiver: A One-of-a-Kind Compassionate Resource for Anyone Caring for an Aged Loved One*. NY: Penguin Books.
- McLeod, B. W. (2000) *Caregiving: The Spiritual Journey of Love, Loss and Renewal*. NYC: Wiley & Sons.
- Wilder (2012). *Understanding Caregiving in Context: Networks of Support*. Wilder Research. St. Paul, MN: Wilder Foundation.



### (3) Revised Cares Committee Report - June 26, 2018

#### Members List:

Ron Anderson\* [rea@umn.edu](mailto:rea@umn.edu), (Chair)  
 Margaret Catambay\* <[m-cata@umn.edu](mailto:m-cata@umn.edu)>,  
 Helen Carlson\* [hcarlson@d.umn.edu](mailto:hcarlson@d.umn.edu), (limited)  
 Martha Feda\* <[marthafeda@gmail.com](mailto:marthafeda@gmail.com)>,  
 Patricia Kelly Hall\* <[pkelly@umn.edu](mailto:pkelly@umn.edu)>,  
 Larry Johnson\* <[larryalanjohnson@gmail.com](mailto:larryalanjohnson@gmail.com)>,  
 Van Linck <[avlinck@icloud.com](mailto:avlinck@icloud.com)>,  
 Ron Matross <[rmatross@gmail.com](mailto:rmatross@gmail.com)>  
 Earl Nolting\* <[enolting@umn.edu](mailto:enolting@umn.edu)>,  
 Kathleen O'Brien <[kobrien@umn.edu](mailto:kobrien@umn.edu)>,  
 Gwen Perun\* <[gperun@d.umn.edu](mailto:gperun@d.umn.edu)>,  
 Paul Rosenblatt <[prosenbl@umn.edu](mailto:prosenbl@umn.edu)>,  
 Amy Sheldon [amylsheldon@gmail.com](mailto:amylsheldon@gmail.com), (limited)  
 Patricia Tollefson <[p-toll@umn.edu](mailto:p-toll@umn.edu)>,  
 Barbara VanDrasek\* [vandr002@umn.edu](mailto:vandr002@umn.edu) (limited)

\* stands for "Care Guide"

**Mission.** The Cares Committee was established to reach out to UMN retirees, UMRA members in particular, and help them address issues of quality of life and well-being. This includes health issues, grief and loss, loneliness, self-actualization, and personal growth.

**Introduction.** The UMRA Cares Committee gets requests for contributions to the UMRA Newsletter, the Website, and the Program Committee. The main functions of the Cares Committee are assigned to task groups or subcommittees as follows: (1) Remembrance, (2) LWLL (Living Well in Later Life) Workshops, (3) Cares Surveys and Needs Assessment, (4) Bookshelf book reviews, (5) Care Guides Program, and (6) Other Care-Related Activities.

**(1) Remembrances Task Group:** Kathy O'Brien collects the University obituary reports, Virgil Larson supplies database information, Pat Tollefson sends sympathy notes to those living within the Metro area and Helen Carlson sends cards for members in the Duluth area. Kathy sends the monthly reports to Becky Anderson for the newsletter. See document "UMRA Remembrance Processes...."

**(2) Workshop Subcommittee:** The Cares Workshop Subcommittee consists of Ron Anderson, Jerry Rinehart (<[g-rine@umn.edu](mailto:g-rine@umn.edu)>), Kathy O'Brien, Earl Nolting, Paul Rosenblatt, and Ron Matross. Here are some workshop topics that have been suggested but are not official. More ideas for workshops are most welcome.

Our workshops in the early part of 2018 were:

1. Meaning in Retirement (Jan. panel)
2. Falls Prevention (Feb. Jean Wynor)
3. New Technology workshop (March)
4. Alzheimer's and Related Disease and Caregiving (April, Joseph Gaugler)

Plans for 2018-19 workshops:

1. October 23 "Disruptive Changes, Losses, and Resiliency, Ted Bowman
2. Nov. 27: "Mindfulness Meditation" (Ron Matross)
3. Jan. 2020 "Finding the Best Long-Term Care Facility (LTCF) – Speaker and Panel (Ron A.)
4. Sleep & sleep disorders in later life – Conrad Iber (tentatively)
5. Meaning of Story Telling in Later Life, Madelon Sprengnether (O'Brien)
6. Options for planned giving ( U Foundation)

Ideas for future workshops:

- Accepting and Treating Hearing Problems Creatively among Older Adults
- Diet and Health
- Challenges of caregiving for younger family members – (suggested by Paul Rosenblatt)
- Exercise and Health in Later Life - Martha Feda (organizer ?), Lisa Lemier (Recreation Asst. Dir)
- Advance Health Care Directives – Pat Kelly Hall (organizer ?) Ann Russell (workshop leader)

**(3) Cares Survey & Needs Assessment Task Group.** Ron Matross leads this effort. Maggie Catambay is helping. This year Ron Matross has collected participant emails and sent them a SurveyMonkey workshop evaluation survey questionnaire after every workshop. This data has been very helpful in improving the workshops.

**(4) Bookshelf Task Group.** We have the opportunity to include a book review related to caring/aging in each Newsletter. Earl, Ron and Pat have written book reviews in the past. Others are welcome to join in. Draft copy should be sent to Becky Anderson.

**(5) Care Guides Program.** Nine UMRA members were trained by Bob Kane to help other UMRA members with caregiving and care-receiving strategies. With the passing of Bob Kane, the program has been relatively inactive. The Care Guides have been added to the Cares Committee. The Care Guides have an “\*” next to their names in the list of Cares Committee members above. We still occasionally get requests for information and the Guides offer help. We often refer people to the Wilder Caregiving Services Center free helpline, 651-280-CARE (2273). Messages for the Care Guides arrive at: [caregiving@wilder.org](mailto:caregiving@wilder.org) or at the UMRA phone: 612-626-4403 (messages checked daily).

The Care Guides are encouraged to informally befriend members that seem to need caregiving ideas and services. The purpose would be to get to know those that need help and then help them match needs with community services. We seek more such ideas for increasing the quality of life of retirees at the University.

**(6) Other Care-Related Activities.** One activity we are reviewing is the need for a social media group on Facebook (FB) devoted to UMRA Cares. UMRA has a FB group at <https://www.facebook.com/pg/UMNRetireesAssociation>

that could be used. To promote greater caring and encourage social interaction on retirement well-being should we take over the UMRA FB group or start our own or try another social media approach? Is anyone willing to serve as a moderator for a Facebook group or to maintain any other social media pages?

**Newsletter Liaisons.** Here are the recurring Newsletter features that we can contribute. We need someone for each feature. Deadline for drafts is 20<sup>th</sup> of each month.

1. Workshop speaker article before each workshop and workshop summary afterwards (drafts go to Kris Mortensen <[kristinemortensen@gmail.com](mailto:kristinemortensen@gmail.com)> with a copy to Ginny Hanson and to the chair) Workshop description article should be 300-350 words plus a photo of speaker. A summary of the actual workshop needs to be written for the next newsletter.

2. Bookshelf column (book- review) (drafts to Becky (Rebecca) Anderson [rbcndrsn@gmail.com](mailto:rbcndrsn@gmail.com) with copy to Ginny Hanson [hanso045@umn.edu](mailto:hanso045@umn.edu) and to the chair) We may be limited to a book review every other month. Monthly column is about 300-350 words.)

3. Food for Thought Column (drafts go to Becky Anderson with copy to Ginny and to the chair) Sadie, the newsletter editor, would like to have several pithy quotes to insert into corners of the newsletter. Earl has been supplying a stream of quotes. Thanks Earl.

4. Remembrance Column (drafts go to Becky Anderson or Ginny Hanson) Thanks Kathleen.

5. UMRA Cares Comm. Webpage “About” statement. Proposed changes should go to Ron Anderson who will work with Ginny Hanson and Cathy Lee Gieke <[leegi001@umn.edu](mailto:leegi001@umn.edu)>.

6. Additional News, e.g., Cares activities or notices from the Minnesota Gerontological Society, Wilder Caregiver Services and Vital Aging Network (VAN) or other sources. (Please send any drafts to the Chair and Becky Anderson with copy to Ginny Hanson. Length about 200-250 words.)

**Cares Committee Meetings:** The next meeting of the Cares Committee (including the Care Guides, who have been merged into the Cares Committee) will be Oct. 23, from 2:30 to 3:30 or shortly after the workshop. We will be meeting in room 410 Coffman Union.

(4) Copy for revisions of static portion of UMRA Cares Comm. webpage

## About UMRA Cares Committee

The UMRA Cares committee members stand ready throughout the year to assist and support members who may be facing serious illness or experiencing the death of a loved one. This committee was formed by members who know first-hand how important it is to have support in times of stress or loss. If you or someone you know wants to talk with a member of UMRA Cares, you may contact members of the Cares Committee as follows: Ron Anderson\* [rea@umn.edu](mailto:rea@umn.edu), (Chair), Margaret Catambay\* <m-cata@umn.edu>, Patricia Kelly Hall\* <pkelly@umn.edu>, Larry Johnson\* <larryalanjohnson@gmail.com>, Ron Matross <[rmatross@gmail.com](mailto:rmatross@gmail.com)>, Earl Nolting\* <enolting@umn.edu>, Kathleen O'Brien <kobrien@umn.edu>, Gwen Perun\* <gperun@d.umn.edu>, Paul Rosenblatt <[prosenbl@umn.edu](mailto:prosenbl@umn.edu)>, or Patricia Tollefson <[ptoll@umn.edu](mailto:ptoll@umn.edu)>, Gerald Rinehart <[g-rine@umn.edu](mailto:g-rine@umn.edu)>, Hellen Carlson [hcarlson@d.umn.edu](mailto:hcarlson@d.umn.edu) (limited membership), Amy Sheldon [amylsheldon@gmail.com](mailto:amylsheldon@gmail.com) (limited membership), Barbara VanDrasek\* [vandr002@umn.edu](mailto:vandr002@umn.edu) (limited membership).  
\* Stands for "Care Guide"

You may also leave a message at the UMRA office phone: 612-626-4403 for anyone above.

**MISSION.** The Cares Committee was established to reach out to UMN retirees, UMRA members in particular, and help them address issues of quality of life and well-being. This includes health issues, grief and loss, loneliness, self-actualization, and personal growth.

## Cares Committee Activities

The UMRA Cares Committee gets requests for contributions to the UMRA Newsletter, the Website, and the Program Committee. The main functions of the Cares Committee are assigned to task groups or subcommittees as follows: Remembrance, LWLL (Living Well in Later Life) Workshops, Cares Surveys and Needs Assessment, Bookshelf book reviews, Care Guides Program.

**Remembrances.** Kathleen O'Brien collects the University obituary reports, Pat Tollefson sends sympathy notes to those living within the Metro area and Helen Carlson sends cards for members in the Duluth area. Monthly reports appear in the UMRA newsletter.

**Workshops.** The Cares Workshop Subcommittee consists of Ron Anderson, Jerry Rinehart, Kathy O'Brien, Earl Nolting, Paul Rosenblatt, and Ron Matross. Most workshops address the general topic of 'Living Well in Later Life.' Generally, there are about six such workshops per year right after the luncheon. More ideas for workshops are most welcome.

**Cares Surveys.** Under the leadership of Ron Matross, the Committee surveys workshop attendees after each event. Margaret (Maggie) Catambay helps with this.

**Bookshelf Book Reviews.** The CARES Committee writes reviews of books on caregiving and caring. These appear in most issues of the UMRA Newsletter. The Committee seeks to start a book club on caring and caregiving. In the meantime, those interested should subscribe to “Today’s Caregiver.com’s Book club:”  
<https://caregiver.com/cg-community/book-club>

**Care Guides Program.** In 2015-16, several Committee members were trained by Dr. Robert Kane to assist UMRA members with caregiving services. Due to Dr. Kane’s unexpected passing in early 2017, we were unable to expand the program. Instead, we partnered with the Caregiving Services Program of Wilder Foundation. Members and other University retirees are encouraged to take advantage of Wilder services by calling their hotline at 651-280-CARE (2273). A brochure on upcoming events can be found by clicking [here](#).

**Caregiving Information and Assistance.** Throughout the year, including summer, your UMRA CARES Committee hopes to provide you with support and resources through emails, programs and on our website on dealing with the death or serious illness of a loved one. For assistance and support in the event of the death or serious illness of an UMRA member or family member, please e-mail us at [umracares@umn.edu](mailto:umracares@umn.edu) or call 612-626-4403, and leave a message for UMRA Cares. Also, if you learn of someone in the UMRA community who is facing a difficult life challenge, please contact the UMRA Cares Committee.

## Caregiver Resources

### Wilder Caregiving Services

For current events brochure, click [here](#).

For hotline or other information call 651-280-CARE (2273)

### Minnesota Gerontological Society (MGS)

MGS Webinars

Seniors & Technology - December 12 noon

(Note: past Webinars can be accessed with a membership of \$40)

[Annual Conference](#) – April (fee)

### Vital Aging Network

See calendar at: <http://www.vital-aging-network.org/calendar.html>

### Center for Spirituality & Healing (CSH)

[Special Lectures & Classes](#)

U of MN Human Resources (HR)

[Retirement Videos](#)

### Univ. of Minn. Retirees Association (UMRA) Workshops

See workshop news on UMRA website and in most recent UMRA newsletter.

### Misc. Grief Support Groups – Allina Health

Listed separately by Twin Cities regions

[National Alliance for Caregiving](#)

An excellent website and newsletter with lots of links

[Senior LinkAge Line 1-800-333-2433](#)

Excellent help line available 8-4:30 M-F

[Minnesota Office of Ombudsman for Long-Term Carer](#)

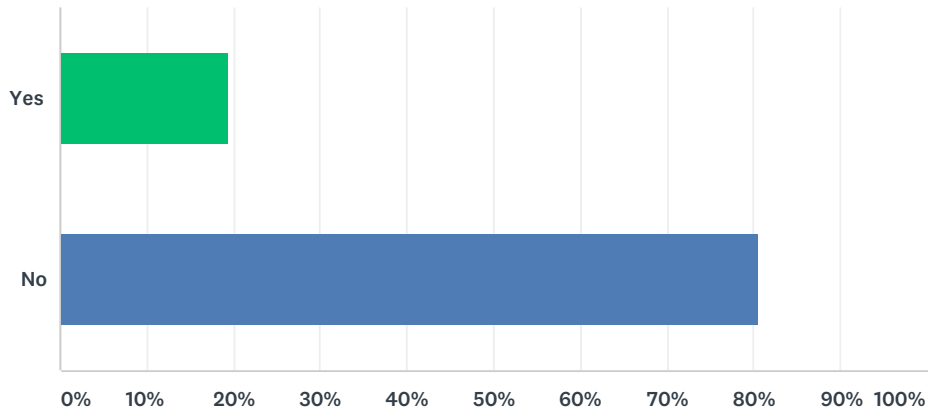
This Office is funded to help LTCF issues & complaints.

[UMN Center on Aging “Long Term Care You Decide” Website](#)

Extensive website built by Dr. Robert Kane to guide caregiver decisions

### Q1 Did you attend the May annual meeting with President Kaler?

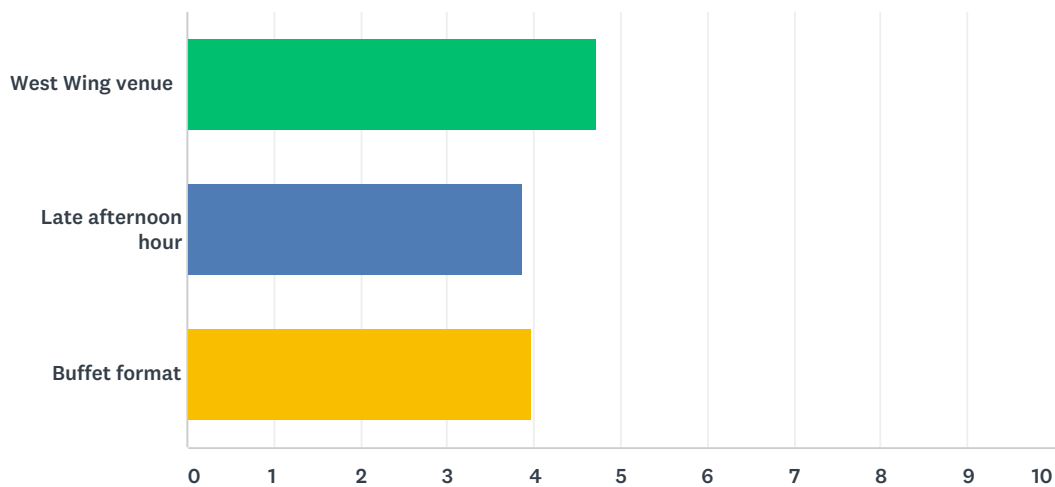
Answered: 252 Skipped: 0



| ANSWER CHOICES | RESPONSES  |
|----------------|------------|
| Yes            | 19.44% 49  |
| No             | 80.56% 203 |
| TOTAL          | 252        |

### Q2 How much did you like or dislike the following aspects of the May meeting?

Answered: 47 Skipped: 205

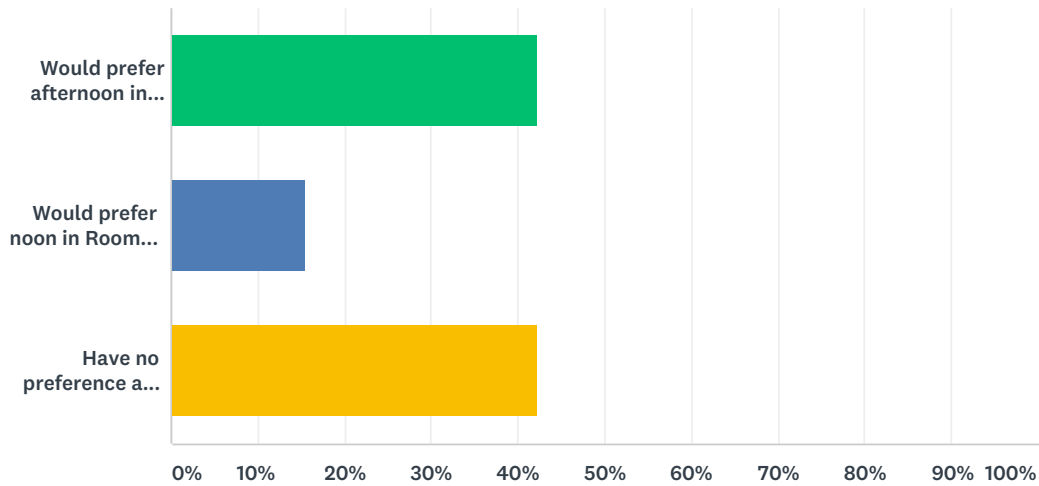


|                     | STRONGLY DISLIKED | DISLIKED SOMEWHAT | NEUTRAL      | LIKED SOMEWHAT | STRONGLY LIKED | TOTAL | WEIGHTED AVERAGE |
|---------------------|-------------------|-------------------|--------------|----------------|----------------|-------|------------------|
| West Wing venue     | 2.22%<br>1        | 0.00%<br>0        | 0.00%<br>0   | 17.78%<br>8    | 80.00%<br>36   | 45    | 4.73             |
| Late afternoon hour | 2.22%<br>1        | 4.44%<br>2        | 22.22%<br>10 | 46.67%<br>21   | 24.44%<br>11   | 45    | 3.87             |

|               |       |        |        |        |        |    |      |
|---------------|-------|--------|--------|--------|--------|----|------|
| Buffet format | 2.17% | 15.22% | 10.87% | 26.09% | 45.65% |    |      |
|               | 1     | 7      | 5      | 12     | 21     | 46 | 3.98 |

Q3 Our September meeting will not be a luncheon, but will be an afternoon meeting in the West Wing with a social hour and appetizer buffet at 4 p.m. followed by a speaker at 5 p.m (with no workshop). For April and May, we have the opportunity to again have afternoon meetings with a possible workshop at 3, appetizers at 4, and speaker at 5. As best you can answer now, do you think you would prefer to have the April and May meetings in the afternoon in the West Wing, or would you prefer the usual luncheon meeting in Rooms ABC?

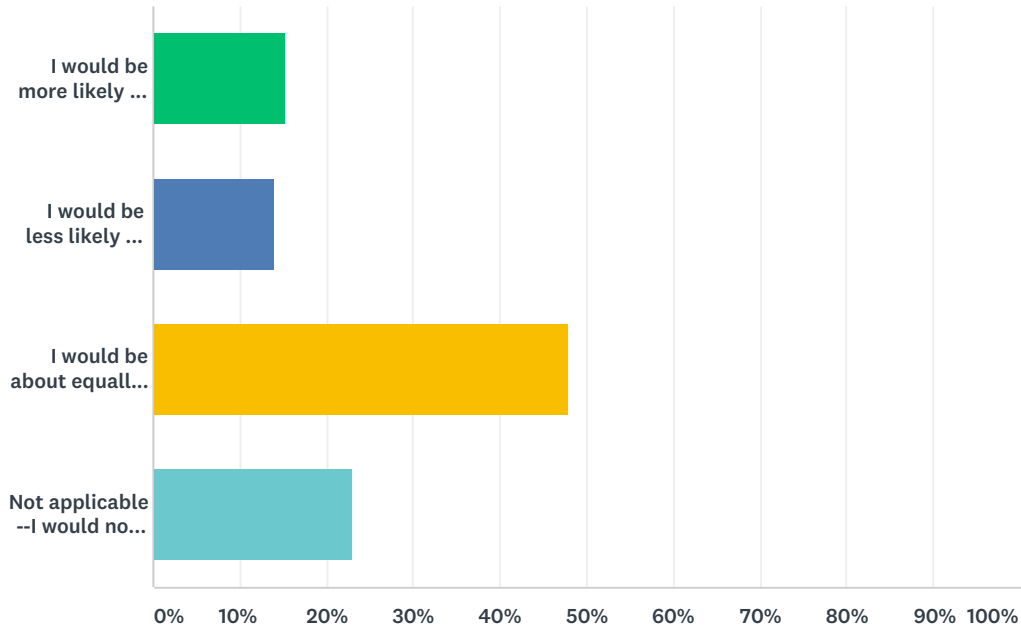
Answered: 232 Skipped: 20



| ANSWER CHOICES                          | RESPONSES |     |
|---|-----------|-----|
| Would prefer afternoon in the West Wing | 42.24%    | 98  |
| Would prefer noon in Rooms ABC          | 15.52%    | 36  |
| Have no preference at this time         | 42.24%    | 98  |
| TOTAL                                   |           | 232 |

Q4 Currently the workshops are from 1:30 to 2:30 pm, following the luncheon meeting. For afternoon meetings next year they would be from 3:00 to 4:00 p.m., preceding the buffet/social hour and speaker. How do you think the change to a later time would affect your attendance?

Answered: 230 Skipped: 22

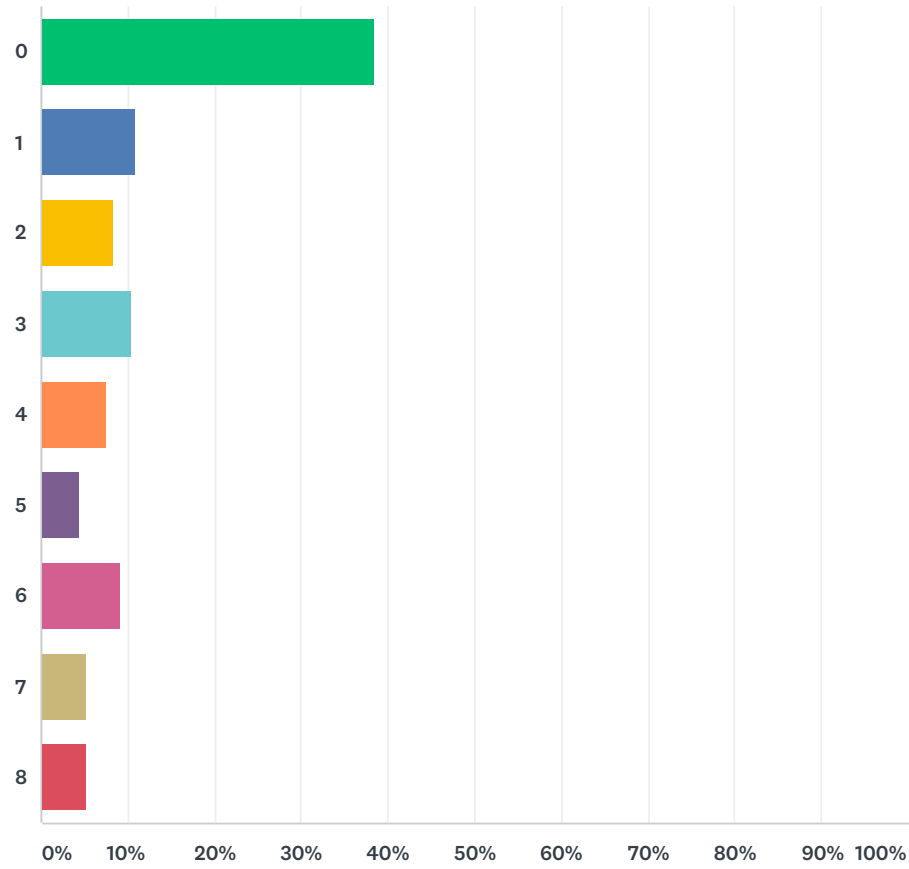


| ANSWER CHOICES  | RESPONSES |     |
|---|-----------|-----|
| I would be more likely to attend workshops than at present                | 15.22%    | 35  |
| I would be less likely to attend workshops than at present                | 13.91%    | 32  |
| I would be about equally likely to attend a workshop as at present        | 47.83%    | 110 |
| Not applicable --I would not be likely to attend workshops in either case | 23.04%    | 53  |
| TOTAL   |           | 230 |

### Q5 Approximately how many of this year's eight luncheon meetings did you attend?

Answered: 228 Skipped: 24

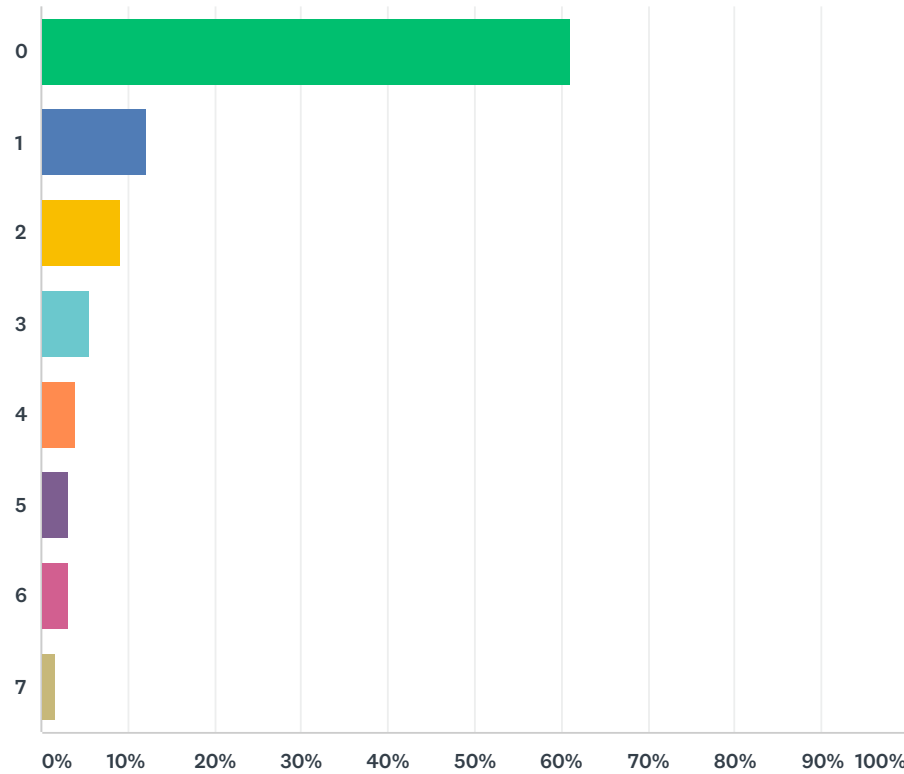




| ANSWER CHOICES | RESPONSES |     |
|----------------|-----------|-----|
| 0              | 38.60%    | 88  |
| 1              | 10.96%    | 25  |
| 2              | 8.33%     | 19  |
| 3              | 10.53%    | 24  |
| 4              | 7.46%     | 17  |
| 5              | 4.39%     | 10  |
| 6              | 9.21%     | 21  |
| 7              | 5.26%     | 12  |
| 8              | 5.26%     | 12  |
| TOTAL          |           | 228 |

**Q6 Approximately how many of this year's seven workshops did you attend?**

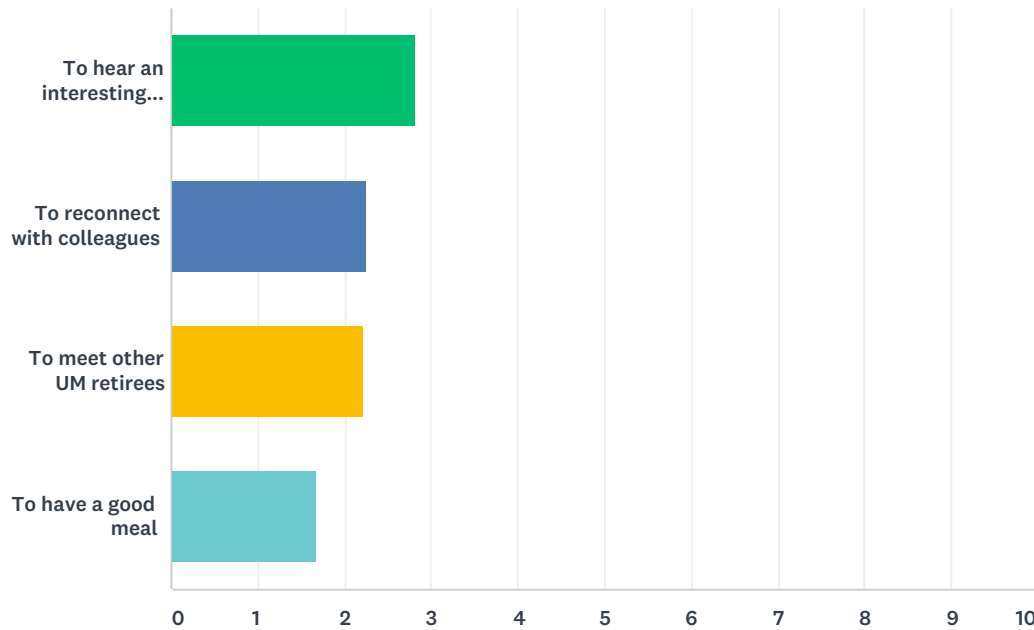
Answered: 229 Skipped: 23



| ANSWER CHOICES | RESPONSES |     |
|----------------|-----------|-----|
| 0              | 61.14%    | 140 |
| 1              | 12.23%    | 28  |
| 2              | 9.17%     | 21  |
| 3              | 5.68%     | 13  |
| 4              | 3.93%     | 9   |
| 5              | 3.06%     | 7   |
| 6              | 3.06%     | 7   |
| 7              | 1.75%     | 4   |
| TOTAL          |           | 229 |

**Q7 What are your reasons for attending UMRA meetings? Please rate how important each of the following are in your decision to attend.**

Answered: 226 Skipped: 26



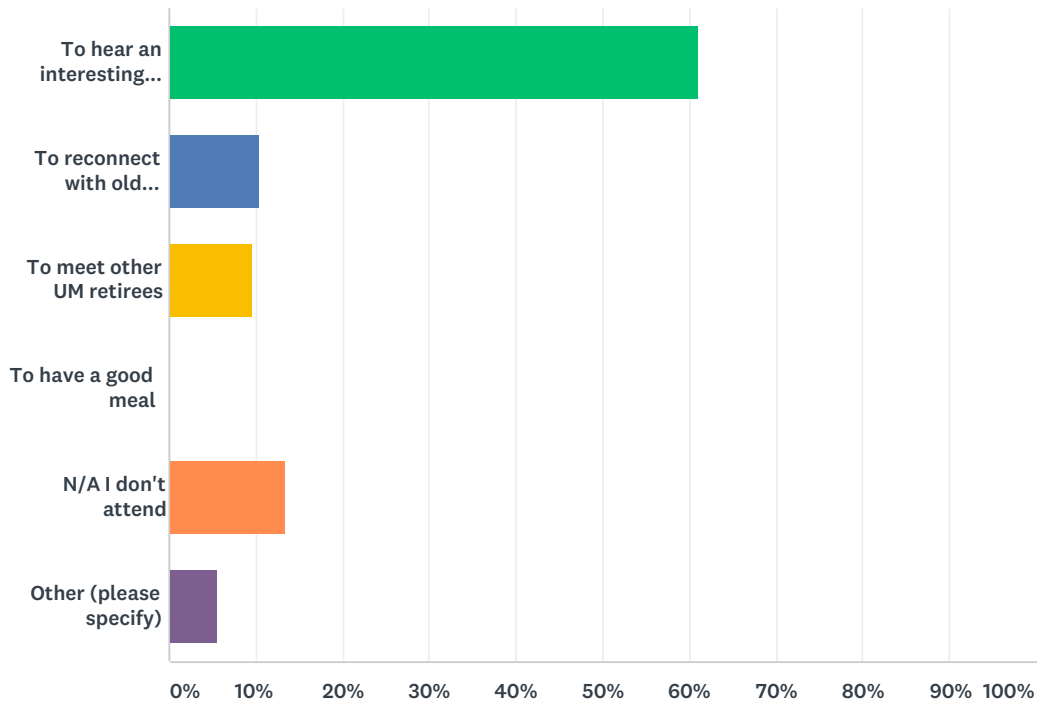
|                                | NOT IMPORTANT | SOMEWHAT IMPORTANT | VERY IMPORTANT | N/A I DON'T ATTEND | TOTAL | WEIGHTED AVERAGE |
|--------------------------------|---------------|--------------------|----------------|--------------------|-------|------------------|
| To hear an interesting speaker | 0.00%<br>0    | 14.16%<br>32       | 71.24%<br>161  | 14.60%<br>33       | 226   | 2.83             |
| To reconnect with colleagues   | 10.19%<br>22  | 42.59%<br>92       | 31.94%<br>69   | 15.28%<br>33       | 216   | 2.26             |
| To meet other UM retirees      | 9.59%<br>21   | 47.49%<br>104      | 28.77%<br>63   | 14.16%<br>31       | 219   | 2.22             |
| To have a good meal            | 36.79%<br>78  | 39.62%<br>84       | 8.49%<br>18    | 15.09%<br>32       | 212   | 1.67             |

| #  | OTHER (PLEASE SPECIFY)   | DATE               |
|----|--|--------------------|
| 1  | I enjoy being around people who are supportive of the U and higher education   | 6/4/2018 11:51 AM  |
| 2  | I am a Board member and should attend in addition of above.  | 6/3/2018 4:32 PM   |
| 3  | Haven't been able to attend any because of health concerns.  | 6/3/2018 3:33 PM   |
| 4  | i was interested in speakers but had conflicts or it was full  | 6/3/2018 8:07 AM   |
| 5  | To stay involved in UMRA   | 6/2/2018 11:52 PM  |
| 6  | I want bread served!!'   | 6/2/2018 10:05 PM  |
| 7  | I live in AZ half of the year and that accounts for some of my non-attendance. When I am in MN I am pretty busy.   | 6/2/2018 6:11 PM   |
| 8  | To learn - highest priority reason   | 6/2/2018 3:02 PM   |
| 9  | Meals are not worth the price.   | 6/2/2018 12:17 PM  |
| 10 | To reconnect with the campus   | 6/2/2018 10:12 AM  |
| 11 | The vegetarian meals are uninspired at best  | 6/2/2018 8:32 AM   |
| 12 | I live in OR and cannot attend UMRA meetings   | 6/1/2018 10:27 AM  |
| 13 | Here is why I cannot attend as regularly as I once did. For older members (80's and 90's) with mobility and hearing issues, the meetings at the university are more and more difficult. Could regional (NE,SE, NW, SW) metro with smaller numbers, handicap accessible parking, and clear acoustics be arranged? | 5/31/2018 10:43 AM |

|    |   |                    |
|----|---|--------------------|
| 14 | To hear what others are doing in retirement. At my table or a speaker.  | 5/30/2018 4:37 PM  |
| 15 | Do not attend as living in Texas  | 5/29/2018 9:14 PM  |
| 16 | however I'm often out of town for all the meetingd  | 5/28/2018 4:07 PM  |
| 17 | To stay connected with the U and up to date on U  | 5/28/2018 2:55 PM  |
| 18 | Learn something to apply to my aging life.  | 5/28/2018 12:13 PM |
| 19 | I've been out of town a lot and unable to attend any meetings, but when my schedule permits I will.   | 5/28/2018 11:40 AM |
| 20 | I went to the financial workshops   | 5/28/2018 9:21 AM  |
| 21 | To support UMRA   | 5/28/2018 9:02 AM  |
| 22 | I an a new retiree as of December and did not attend meeting as of yet (but plan to in the coming year)   | 5/28/2018 8:48 AM  |
| 23 | Speakers and workshops often have good information as well as being interesting.  | 5/28/2018 7:37 AM  |
| 24 | Note: I am a snowbird; when in Minnesota I live 250 miles from the U campus; in the winter, it is over 1500 miles from the U; very hard to attend any luncheons | 5/28/2018 6:07 AM  |
| 25 | I'm on the board, so I go to the luncheons to support them  | 5/27/2018 11:13 PM |
| 26 | I have a long-standing routine engagement on UMRA luncheon meeting days.  | 5/27/2018 9:51 PM  |
| 27 | most fill up before I have time to figure out my schedule.  | 5/27/2018 9:40 PM  |
| 28 | CC meals are sparse for the price.  | 5/27/2018 9:30 PM  |
| 29 | Meals need improvement  | 5/27/2018 9:21 PM  |
| 30 | The meal could be an attraction   | 5/27/2018 8:43 PM  |

### Q8 What would you say is the single most important reason for your attending UMRA meetings (select one)

Answered: 231 Skipped: 21



ANSWER CHOICES

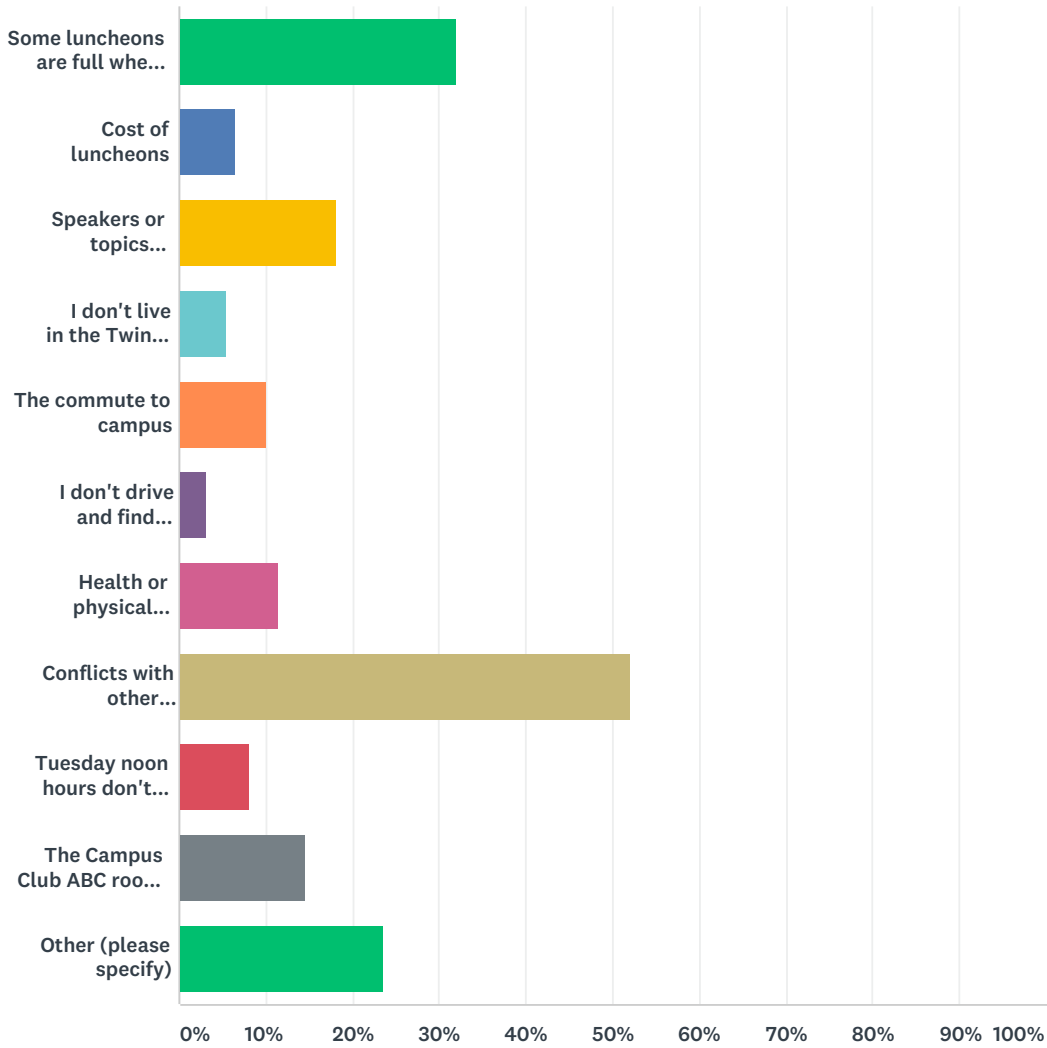
RESPONSES

|                                  |        |            |
|----------------------------------|--------|------------|
| To hear an interesting speaker   | 61.04% | 141        |
| To reconnect with old colleagues | 10.39% | 24         |
| To meet other UM retirees        | 9.52%  | 22         |
| To have a good meal              | 0.00%  | 0          |
| N/A I don't attend               | 13.42% | 31         |
| Other (please specify)           | 5.63%  | 13         |
| <b>TOTAL</b>                     |        | <b>231</b> |

| #  | OTHER (PLEASE SPECIFY)  | DATE               |
|----|---|--------------------|
| 1  | hard to rate a single reason  | 6/2/2018 3:11 PM   |
| 2  | see question 6 answer   | 6/2/2018 3:02 PM   |
| 3  | Either the speaker or to have a useful workshop.  | 6/1/2018 9:24 PM   |
| 4  | I would appreciate much more emphasis on public policy/social justice issues particularly in these times. | 5/31/2018 10:43 AM |
| 5  | Due to the current timing of meetings I have not been able to attend                                      | 5/29/2018 6:41 AM  |
| 6  | I attend only if I'm interested in the speaker and/or workshop.   | 5/28/2018 10:11 AM |
| 7  | Stay connected in all ways to the U of M  | 5/28/2018 8:50 AM  |
| 8  | for the future - my reason would be to connect with colleagues  | 5/28/2018 8:48 AM  |
| 9  | All of the above.   | 5/28/2018 7:37 AM  |
| 10 | IF I were attending, it would be to meet/socialize with other UM retirees.                                | 5/27/2018 9:51 PM  |
| 11 | Listen to an interesting speaker AND meet fellow retirees   | 5/27/2018 8:45 PM  |
| 12 | To be a part of the University  | 5/27/2018 8:32 PM  |
| 13 | a combination of speaker, reconnect with colleagues & lunch   | 5/27/2018 8:02 PM  |

**Q9 What are the issues that prevent you from attending more UMRA meetings than you currently do? (Check all that apply, if any)**

Answered: 219 Skipped: 33



| ANSWER CHOICES   | RESPONSES  |
|--|------------|
| Some luncheons are full when I try to register                 | 31.96% 70  |
| Cost of luncheons  | 6.39% 14   |
| Speakers or topics generally not of interest                   | 18.26% 40  |
| I don't live in the Twin Cities area                           | 5.48% 12   |
| The commute to campus  | 10.05% 22  |
| I don't drive and find transportation to the U inconvenient    | 3.20% 7    |
| Health or physical mobility issues                             | 11.42% 25  |
| Conflicts with other events/activities                         | 52.05% 114 |
| Tuesday noon hours don't work well for me                      | 8.22% 18   |
| The Campus Club ABC rooms don't lend themselves to socializing | 14.61% 32  |
| Other (please specify)   | 23.74% 52  |
| Total Respondents: 219   |            |

| # | OTHER (PLEASE SPECIFY) | DATE |
|---|------------------------|------|
|---|------------------------|------|

# UMRA Survey on Monthly Meeting Format and Venue

SurveyMonkey

|    |  |                    |
|----|--|--------------------|
| 1  | bad weather  | 6/4/2018 6:27 PM   |
| 2  | I subscribe to all lunches. Parkiing in bad weather can be a problem.  | 6/4/2018 4:20 PM   |
| 3  | I come when I can and make sure to come when there is a good speaker   | 6/4/2018 11:51 AM  |
| 4  | Out of town  | 6/4/2018 9:28 AM   |
| 5  | We spend some time in Florida each winter.   | 6/4/2018 4:17 AM   |
| 6  | none   | 6/3/2018 4:32 PM   |
| 7  | People who sign up for the entire season are apparently filling up the small room before it even is advertised.  | 6/3/2018 12:47 PM  |
| 8  | distance from parking lot to meeting room (long push in a wheelchair   | 6/2/2018 8:12 PM   |
| 9  | Other personal and professional commitments  | 6/2/2018 7:06 PM   |
| 10 | I don't live in the Twin Cities at least half of the year.   | 6/2/2018 6:11 PM   |
| 11 | I live out of state during the winter months   | 6/2/2018 5:32 PM   |
| 12 | would like to hear speakers without being attached to luncheons  | 6/2/2018 5:30 PM   |
| 13 | when traveling   | 6/2/2018 3:11 PM   |
| 14 | I attend always if I can so above do not apply to me   | 6/2/2018 2:53 PM   |
| 15 | And we're gone half the year (winter)  | 6/2/2018 2:24 PM   |
| 16 | Feel there is more faculty than Civil Service staff that attend the meetings.  | 6/2/2018 2:09 PM   |
| 17 | Travels tend to overlap meeting dates.   | 6/2/2018 1:59 PM   |
| 18 | I'm a new member and plan to attend in the future  | 6/2/2018 1:49 PM   |
| 19 | parking unavailable  | 6/2/2018 12:21 PM  |
| 20 | I'm out of the country 3 months out of each year. When I'm here, I hate to break up the day with a trip to campus.   | 5/31/2018 8:26 PM  |
| 21 | As Elder Justice issues come to the foreground in Minnesota, I believe that UMRA must play a more active role.   | 5/31/2018 10:43 AM |
| 22 | We are away in the winter.   | 5/31/2018 10:11 AM |
| 23 | It's been a crazy year for me.   | 5/30/2018 1:27 PM  |
| 24 | I'm just in the habit of attending as many meetings as I can.  | 5/30/2018 9:09 AM  |
| 25 | I have fall classes, Tuesdays & Thursdays 11:50a - 1:30p00   | 5/29/2018 12:11 PM |
| 26 | Socializing isn't the issue, the rooms are just cramped.   | 5/29/2018 9:51 AM  |
| 27 | I help at the Dental School Tuesdays and Wed until 1:00 p.m.   | 5/29/2018 6:41 AM  |
| 28 | We are snowbirds and are out of town from January through April.   | 5/28/2018 10:08 PM |
| 29 | am in MN only in the summer and early fall   | 5/28/2018 3:26 PM  |
| 30 | overcrowded  | 5/28/2018 2:48 PM  |
| 31 | Meal quality is inconsistent   | 5/28/2018 1:45 PM  |
| 32 | So far I have attended and enjoyed all 2017-18 meetings  | 5/28/2018 12:13 PM |
| 33 | Difficulty in getting to parking garage and long walk to Campus Club   | 5/28/2018 12:00 PM |
| 34 | I've been healing from brk NH en ankle, now healed, and more needed foot surgery.  | 5/28/2018 10:19 AM |
| 35 | We forget to go when we have signed up and paid to be there  | 5/28/2018 10:16 AM |
| 36 | I don't want to go to luncheon meetings  | 5/28/2018 9:21 AM  |
| 37 | NA; I attend all of them already   | 5/28/2018 9:02 AM  |
| 38 | I am a caregvier and never know ahead of time if I can come or not, thus I cannot make early reservations. I would like to come. It depends on how my husband feels. | 5/28/2018 7:37 AM  |

|    |  |                    |
|----|--|--------------------|
| 39 | This year we were able to attend all of them. But a scheduling conflict or poor health might prevent us in the future. We take the bus to CMU.   | 5/28/2018 7:37 AM  |
| 40 | Parking, traffic   | 5/28/2018 7:20 AM  |
| 41 | See previous note about being a snowbird   | 5/28/2018 6:07 AM  |
| 42 | My significant other is an alumna but not a member.  | 5/28/2018 4:49 AM  |
| 43 | I attended all of them   | 5/27/2018 11:13 PM |
| 44 | Parking  | 5/27/2018 10:22 PM |
| 45 | Campus Club ABC rooms are small relative to the number members attending.  | 5/27/2018 10:09 PM |
| 46 | Cost of lunches is high for what we receive, so the speaker needs to be very interesting for me to attend.   | 5/27/2018 10:01 PM |
| 47 | Too small a space for last minute decisions  | 5/27/2018 9:40 PM  |
| 48 | I'm a vegetarian, and the vegetarian meals at the Campus Club can be challenging for my old guts.  | 5/27/2018 8:47 PM  |
| 49 | Want to avoid someone.   | 5/27/2018 8:35 PM  |
| 50 | Travelling   | 5/27/2018 8:27 PM  |
| 51 | Events are so crowded it is too hard to connect with friends/colleagues  | 5/27/2018 8:09 PM  |
| 52 | The parking and commute to campus is the primary reason I do not attend, but pay my dues - for I believe I. The goals of the organization. A off campus, convenient location with great parking would make my attendance much more likely. | 5/27/2018 7:55 PM  |

## Q10 Please add any further thoughts or advice on the questions of venue, hour, and food.

Answered: 91 Skipped: 161

| # | RESPONSES   | DATE              |
|---|---|-------------------|
| 1 | The tests of the West Wing are good, There needs to be better/more food and service concomitant with the quality of the speakers and ambiance.  | 6/4/2018 4:20 PM  |
| 2 | Great speakers and interesting workshops are the drivers for me. I would like to see more interaction with the U and issues affecting support for the U. Legislative, regents selection,  | 6/4/2018 11:51 AM |
| 3 | Currently, don't have any. Am certain that UMRA executives and board have carefully considered the above.   | 6/3/2018 4:32 PM  |
| 4 | Again, this recent rule of members signing up for the entire season make many of the events filled before even being announced. Therefore it has been difficult to get in. Space is too small now so something needs to be done about the location. No ideas there but just a fact of what is happening.  | 6/3/2018 12:47 PM |
| 5 | I'm sorry if you're getting a second survey from me. After seeing your questions I recognize that I filled out this form once before but maybe you didn't receive my previous submission. Since retiring I have regularly attended University classes under the Senior Citizens Education Program (SCEP) and the noon hour has always conflicted with both a morning or afternoon class time. I have enjoyed the few times I have been able to attend. I'm please that you are considering this timer/date change and hope that it means I will be able to attend more often in the future.                               | 6/3/2018 12:45 PM |
| 6 | I have only attended one luncheon meeting. Traffic coming to campus was terrible that day so I missed the socializing part. The food was so so (I am a campus club member so I hate to say that). The speaker was great, very enjoyable. Since then I have tried to sign up a couple of times but been too late. I have also missed opportunities because of travel and recovery from surgery. I like the idea of using the West Wing, but don't like the idea of negotiating rush hour traffic after the meeting. It will be especially difficult for anyone coming from south Minneapolis with the construction on 35W. | 6/3/2018 11:11 AM |
| 7 | Add bread to the meal!!!  | 6/2/2018 10:05 PM |



|    |   |                    |
|----|---|--------------------|
| 8  | I like the campus venue, but I suggest a larger space so that as many people can attend as possible. I would try to keep the cost of the meal down as much as possible. Appetizers may be ok with a lower cost, especially for those whose major reason for coming is to connect with others. I was surprised that the Annual Mtg with Pres Kaler cost \$30. I suggest that the Annual mtg of the Association be open and free to members. And if there is a meal, price it same as the other meals during the year. Thank you to the leadership of the Association.  | 6/2/2018 7:06 PM   |
| 9  | I read the newsletter religiously and will continue to support the organization through membership. I always think your speakers and workshops look interesting and would probably attend some if we were here more of the year.  | 6/2/2018 6:11 PM   |
| 10 | Would enjoy attending such interesting speakers but do not want to devote the time to the attached luncheon time. Appreciate your survey!!  | 6/2/2018 5:30 PM   |
| 11 | Not enough space for luncheons, also if can have table sign up based on prior history and interest for Schools would be helpful so can have more interesting and relevant conversation. food is irrelevant as eat often at the a member. Learning based upon speaker or other UMRA members sharing interesting experience/information is better. Hate to say but also need younger members with more common interests as well.  | 6/2/2018 4:23 PM   |
| 12 | The food is usually disappointing.  | 6/2/2018 3:18 PM   |
| 13 | I hope to attend more UMRA meetings in the future, but seem to have other conflicts when the meetings are held. I did enjoy the May meeting so hope to be able to attend more in the future.  | 6/2/2018 3:12 PM   |
| 14 | If we can solve the space problem, Coffman is fine with me. I am flexible for the hours and the food.   | 6/2/2018 2:53 PM   |
| 15 | Keep up the good work.  | 6/2/2018 1:47 PM   |
| 16 | We enjoy coming when we do. We find sharing with tablemates enough socializing. We mainly come when there is a speaker that addresses issues important to us. Cost is a problem and cost seems to be rising. It is unlikely that we would attend every meeting.   | 6/2/2018 12:17 PM  |
| 17 | For the luncheon meetings and workshops, the time between lunch and workshop is too long. I assumed the time was needed for the staff to clear luncheon dishes, but since they don't do that, please shorten the time we must stand around waiting for the workshop.  | 6/2/2018 10:16 AM  |
| 18 | Thanks for looking out for us. You have a hard job, and all of us need to let you do it and be grateful. Keep searching for a good on-campus location. Is there any room at McNamara?   | 6/2/2018 10:12 AM  |
| 19 | If I had been able to attend this past year, I often did not find the food choice appealing. Perhaps going to an appetizer event would change that.   | 6/2/2018 10:08 AM  |
| 20 | Other than the friend I usually come with, I seldom run into people I know.   | 6/2/2018 8:32 AM   |
| 21 | Lunch is a tad expensive, but I understand why and don't mind. Socializing with members and the workshops are valuable and enticing, and I regret that other activities kept me away so much this year.   | 6/1/2018 9:24 PM   |
| 22 | You do a very nice job of arranging interesting speakers and workshops. I appreciate the opportunity to participate, even though I don't attend very often. May attend more often in the future if I can find a friend to attend with.  | 6/1/2018 3:50 PM   |
| 23 | The meetings are always Tuesday. I am a Master Gardener and the UMRA meetings always fall the same day of the month so I have to choose. Therefore I never get to attend UMRA. Is there any way of changing up different days so those of us that have conflicts can at least attend some meetings? With the change in the timing of meetings to the afternoons, remember that traffic is horrible at those hours for those of us driving home. Makes me wonder if I will attempt the traffic and just give up trying to make it. Why does it have to be the Campus Club for meetings. I think the Campus Club is controlling UMRA and life is never easy moving on - it 's work. A life lesson is that we outgrow situations. The campus is huge. Northrup, Academic Center, etc. East Bank and St Paul Campus (parking nice). Pot lucks are nice and no requirements to bring anything for those unable to do so. A \$16 lunch can be trimmed to a better package - maybe by moving elsewhere. The Arboretum has done potluck gatherings and the food is fantastic and healthy. Great cooks out there!! | 5/31/2018 11:58 AM |

|    |  |                    |
|----|--|--------------------|
| 24 | From my perspective, UMRA is in transition from a print to digital world, from older members to many newer and younger members, from a set schedule to other options. Beyond where and when the organization meets, I think there needs to be more consideration of its vision/mission. Why does the UMRA exist? Is it to benefit only the members or the larger society? Why can't there be opportunities for contributions to a scholarship fund for students who are the first in their families to attend the university? Why isn't there more emphasis on public policy with Position Papers on issues such as Elder Justice? Since UMRA is the system wide retiree organization, why doesn't it have a map of all the research centers and coordinate campuses in the system and make a special effort to connect them to the UMRA website (perhaps an UMRA article in the UM System Brief)? Thanks for soliciting input and for considering these issues.   | 5/31/2018 10:43 AM |
| 25 | It would be nice to have the luncheons in the West Wing, is possible, as it is sometimes unpleasantly crowded in the other venue.  | 5/31/2018 10:11 AM |
| 26 | Thanks for trying new options. Mixing it up might increase participation and offer other opportunities. Like tours or speakers not available before.   | 5/30/2018 4:37 PM  |
| 27 | I'd like to be back in the loop, just need to make the times work.   | 5/30/2018 1:27 PM  |
| 28 | Use of a larger plate supplied for the buffet would be better and would encourage choice and amount of food selected better than such a small plate.   | 5/30/2018 9:09 AM  |
| 29 | First of all., I resent that UMRA seems to be a prisoner of the campus club which itself is struggling to survive, I would guess. Here we are nicely retired, looking to hear interesting speakers from our rich number of faculty..interesting things they are doing...but often we get some contemporary political view or something on aging...again!! where are the geologists, the geographers, the astronomers maybe even physicists. Let me go on...then, we are crowded into a room often with poor acoustics and fair visibility to eat a high priced luncheon, often with dirty plates left on table...ugh!! and for \$32 a couple...give me a break!!! Whoever had the idea of afternoons in the west wing ought to have his/her head examined...ever try to commute to the U up 35W in afternoon...traffic needs to be thought of. I admit loving to come back to campus and willing to do so but not so eager when there is a \$32 lunch and \$6 parking in a crowded room with little opportunity to say boo to anyone (the 10:30 coffee is not the right scene for that sort of interaction ) and a speaker..rarely of great interest. I do admit Lori Sturdevant was great, as was the prof who used to run showboat..well that was a well done act, and years back we had someone from astronomy..and I am sure others which we have appreciated . What is wrong with the Macamera center..parking is great and I am sure we could find ways that the U wouldn't charge \$7 for a god damned glass of wine that might cost \$5 a bottle. You might find yourself with a lively and large group of retirees enjoying and socializing with a bit of wine and space to move about and a talk. Have a nice day as they say..so often..RMcCullister, retired assoc dean Med. | 5/29/2018 8:58 PM  |
| 30 | Late Tuesday afternoons do not work for me because I attend a once-a-month meeting out of town that starts at five. This is why I haven't attended the workshops. I enjoy the UM retirees and will participate as fully as possible no matter what time and place are selected. Thank you for all your good work.  | 5/29/2018 4:25 PM  |
| 31 | The buffet line for the annual meeting moved slowly because there were too many choices and several of those choices were tiny pieces of food (carrots, berries, cheese that needed to be cut, etc.). If the motivation for moving the meetings to the West Wing includes accommodating larger attendance and facilitating the flow for socializing, the food offered on the buffet needs to be similarly in accord, i.e. fewer choices that are better suited for self-service (especially for an elderly population) or a buffet line with servers.  | 5/29/2018 1:30 PM  |
| 32 | I would like to see the Campus Club do a little better job with the food given the proposed price increase ( I realize the inflation issue).   | 5/29/2018 1:11 PM  |
| 33 | Good to to have had-outs with guest presenters, with a schedule of all other UMRA meetings.  | 5/29/2018 12:11 PM |
| 34 | I really enjoy meeting people at my table (as well as visiting with good friends there) but it would be nice to be able to mingle with people at other tables, so the social hour in the west wing would seem to provide more opportunity to meet more people. Otherwise I have enjoyed the lunches overall and the Campus Club (thought it is pretty crowded for lunch) is very convenient for me (and my husband).   | 5/29/2018 11:29 AM |
| 35 | The Ratatouille entrée that was served recently was one of the worst entrees we have had. Salmon was not good either. Perhaps stay will safer menu choices.  | 5/29/2018 11:26 AM |

|    |  |                    |
|----|--|--------------------|
| 36 | The lunch at the May meeting was disappointing. For visiting with others, the informal gathering before the meal seems to work ok, although space is limited so that it gets crowded. Continue to encourage outside activities like the visit to the state capital building.   | 5/29/2018 10:03 AM |
| 37 | Do we really need lunch? The ABC rooms would probably be big enough without the tables. A possibility, for openers: 10:30-11:00/11:15, Rolls and coffee, followed by the program. People would then be on their own for lunch, perhaps with friends in the Campus Club. Don't have a plan for the workshops.   | 5/29/2018 9:51 AM  |
| 38 | I meet with Kiwanis at 1:30 on Tuesdays. This conflict is the reason that I don't attend more meetings.  | 5/29/2018 6:25 AM  |
| 39 | I'd rather have a meal instead of appetizers, whether at noon or later in the afternoon.   | 5/28/2018 7:38 PM  |
| 40 | The lunches served in the Campus Club during the meetings were disappointing. Perhaps a salad, sandwiches, soup would be a better option. Another option is for meeting late mornings for coffee and some rolls, muffins, fruit, etc. If meetings were to be changed to the afternoons, I would suggest schedules that avoid rush hour traffic! Coffee, cold beverages and light appetizers would be a nice addition.  | 5/28/2018 3:26 PM  |
| 41 | Thank you to the UMRA officers and board for their work to make UMRA events more available to U retirees!  | 5/28/2018 2:55 PM  |
| 42 | #1. West wing would fine even though I don't have claustrophobia--- #2. Don't need a gourmet meal for lunch. .   | 5/28/2018 2:48 PM  |
| 43 | This past year was too much taken up with care-giving. I will try next year to attend more meetings. Ted Galambos  | 5/28/2018 12:43 PM |
| 44 | You did not ask about noon meetings and PARKING availability in River Road Ramp. I would gladly pay \$1-5 extra to be assured of a parking place! I would guess that a major advantage of late afternoon meetings would be easier parking at Coffman. At some future time I will have to stop driving and then there may be a major problem to solve to continue attending meetings. Weather is a factor in my winter driving as well. The Board should revisit the attendance issue for our "older" members who have stopped driving. How about a Cares Committee task force on this problem that would explore ride share, Uber, Lyft, etc? They might also consider the many issues that members over 80-85 face in maintaining connections with UMRA, with other people, and life in general.  | 5/28/2018 12:13 PM |
| 45 | A less congested area and larger meeting facility (such as is available on the St. Paul Campus) would allow me to attend functions.  | 5/28/2018 12:00 PM |
| 46 | \$30 for a table of unpalatable snacks was a joke. A separate dessert table with cake & pie (not just cookies) would have helped May. But best of all would be if the Campus Club would move their scattering of regular lunchers to ABC. Note that is at most 6 days/year since September and May are outside the calendar for many. And we are now talking about \$2,000 plus per meal, no small incentive. As to timing, luncheon is by far the best, with a sit-down, served meal.   | 5/28/2018 11:13 AM |
| 47 | One of the most beneficial aspects of retirement to me is the freedom to attend events during the day. Because I have a number of commitments during late afternoon and evening, I would be forced to attend fewer UMRA gatherings if scheduled during the late afternoon. (Heavy "rush hour" traffic would also be a strongly negative factor.)   | 5/28/2018 11:09 AM |
| 48 | I just joined UMRA and have only attended the May annual meeting so far and look forward to attending more meetings in the coming year.  | 5/28/2018 10:59 AM |
| 49 | Although I was unable to attend the May meeting in the afternoon, I'm guessing that driving to and from the U would be more difficult during those hours when there will be more commuter traffic than during the midday. Although traffic isn't a problem for me (yet), I know many other retirees who refuse to drive when the roads are at their busiest. Also, due to progressing scoliosis and sciatica, I take opioid painkillers throughout the day, making me somewhat sleepier than normal by late afternoon. I certainly don't expect UMRA to schedule meetings based on my needs, but my own situation makes me aware that others may have similar problems with tiredness as the day progresses. I think the plan to try a variety of meeting times in the next year is a good idea and will let us figure out what works for the majority who wish to attend. I plan to attend meetings at both midday and afternoon times. | 5/28/2018 10:40 AM |

|    |  |                    |
|----|--|--------------------|
| 50 | I had a wonderful time visiting with people at the May meeting. There was room to move around and mingle. Round tables are very conducive to conversation. Also, it was easy to "table-hop" to say a few words to a friend at another table. The West Wing venue lends itself to fellowship! I look forward to our next couple of meetings in the West Wing of the Campus Club while we still enjoy daylight beyond 6:00 p.m.  | 5/28/2018 10:34 AM |
| 51 | Cost of the luncheons are high for the food. I understand that is because of the cost they charge and for fees and the board is trying to work it out the best they can. I certainly don't come for the food as I could go elsewhere for a better meal for the price. It is the quality and diversity of speakers that brings me.  | 5/28/2018 10:22 AM |
| 52 | I've especially enjoyed the noon meetings with a meal.   | 5/28/2018 10:19 AM |
| 53 | As I mentioned, I only attend if I have a strong interest in the speaker or the workshop. Sometimes I have other conflicts and moving it later in the day will probably increase those conflicts. However, because I only attend a few luncheons a year, I think the majority should rule on this issue.   | 5/28/2018 10:11 AM |
| 54 | How will the change of venue and food affect the cost of the meal?   | 5/28/2018 9:54 AM  |
| 55 | I will not attend if the meetings are later in the afternoon. The driving to campus is too horrible with 35W under repair, and the traffic as the U lets out for the day adds to the unpleasantness. I MUCH PREFER the luncheons. You could make the luncheons more of a buffet. The food is terrible, but I don't attend for the food. I accept that it is terrible, but maybe you could do something about that. I am interested in the speaker.   | 5/28/2018 9:41 AM  |
| 56 | HAVE ATTENDED THIS YEAR TWO SIG MEETINGS IN TAX/HEATH ISSUES, AND EARLY LAST YEAR TWO SIG IN PHOTO. ST PAUL CAMPUS IS MOR APPEALING TO ME THAN MAIN CAMPUS. COMPLEMENT UMRA IN EFFORTS TO BE MORE RELEVANT TO NEEDS OF UMRA MEMBERS.   | 5/28/2018 9:39 AM  |
| 57 | Campus Club ABC is very inadequate and frequently when I might have attended registration was already closed. Lunch time is preferred, but doubt anyone comes to have a good meal; food is only fair.  | 5/28/2018 8:53 AM  |
| 58 | My first thought is that if the current space does not fill the needs of the organization, then - kudos for locating an alternative space and experimenting with that! The coming year should be interesting. If it does not work out, there is always the option of going back to the luncheon idea.  | 5/28/2018 8:48 AM  |
| 59 | ABC is obviously cramped which makes it difficult to navigate (esp for folks in wheelchairs or using other assistance devices) and discourages people from getting up to go see a former colleague. I usually jump on the notice so I'm assured a space. Having reserved parking is helpful, but it still takes a LONG time to find an open parking slot and get into CMU. Food quality is inconsistent but has been better recently. I'd be willing to pay more for a higher quality meal. Table space is also cramped which prohibits having a separate salad plate. I enjoy the variety of speakers and topics. Sometimes the luncheon interferes with OLLI classes that I attend. I've enjoyed the luncheons very much. Keep those grey cells working! | 5/28/2018 8:48 AM  |
| 60 | I am frustrated when I cannot attend, such as the last dinner time meeting. Can the lectures be recorded and available on your website?  | 5/28/2018 7:54 AM  |
| 61 | I like the the afternoon sessions and the buffet format. A buffet allows people to make their own choices for nourishment.   | 5/28/2018 7:37 AM  |
| 62 | I attend the luncheons mainly to hear the speaker. The luncheons are not worth what we pay for them - it would be better to go through the line and choose what you like for the same price. going through the line is equivalent to having a buffet and you end up happy with your choice.  | 5/28/2018 7:37 AM  |
| 63 | Need handicapped accessibility for spouse. Need to be able to come at spur of moment. Ok if no lunch for those of us who cannot make reservations ahead of time.   | 5/28/2018 7:37 AM  |

|    |   |                    |
|----|---|--------------------|
| 64 | 1. Campus Club works great for us as we live a short distance away by bus, and, so far, we are in good health. I am concerned about those who would like to attend for various reasons listed above. 2. One solution—for those who can't be there in person or can't afford the lunch—would be to videotape and have the meetings available on the UMRA website. Do coordinate campuses have meetings? 3. Please make sure that questions from the audience are either repeated by someone with a microphone or make traveling mics for questioners. 4. For speakers and workshop leaders, meet with them earlier to explain who the members are and address— when relevant— two questions: *What actions can UMRA members do for your organization, cause, project, etc.? *What can your organization, cause, project do for UMRA members? 5. I would prefer fruit rather than candy for dessert. 6. I really like the buffet style for us, but am concerned about those who might find it difficult selecting and carrying food to their tables. Thank you! | 5/28/2018 7:37 AM  |
| 65 | The late afternoon time works well in avoiding traffic congestion during commuting time, and allows time to get home before dark, except in winter. The luncheon time might work better in winter months. Thanks for your thoughtful planning and for seeking constructive input from members.  | 5/28/2018 7:20 AM  |
| 66 | Campus Club luncheons have been tasty but often a bit skimpy. An increase in the cost is inevitable.  | 5/28/2018 7:12 AM  |
| 67 | Just make it possible for people who wish to attend to be able to do so—at least on a rotating basis. I suspect right now it is the same people who are able to attend all/most of the time and the rest get left in the dust. One option is what an over-subscribed wine club I belong to does: it does a raffle [sign up by a certain time and then the names of the people who are able to attend are drawn out of a hat]. Another option is to rotate: if someone attended the lunch this month, they are put at the bottom of the list for next month. Have a cut-off date and then inform those who can attend and those who can't.   | 5/28/2018 6:07 AM  |
| 68 | I found that the cost of the lunch a for the meeting I attended to be quite expensive for what was served. If I want to spend \$16, I can find much more exciting and plentiful food elsewhere.   | 5/28/2018 5:55 AM  |
| 69 | I prefer noon luncheons and workshops and like to pay in advance  | 5/28/2018 5:55 AM  |
| 70 | Prefer noon meetings.   | 5/28/2018 12:17 AM |
| 71 | The West Wing and buffet were amazing. The room was large, with plenty of room to move around. The windows on 3 sides of the room were very nice, and didn't interfere with the projection. The buffet was plenty of food for me. And it was extremely well presented, interesting, and delicious! The buffet was better than the lunches, and I would be happy to have this kind of buffet all the time, if possible, even at lunch time. The time of day is unimportant to me. I don't mind driving in rush hour, or in the dark, although I understand some do.  | 5/27/2018 11:13 PM |
| 72 | Thank you for considering a new time. Sine my retirement I have enrolled in University classes which has beeb a lifeline for me. The noon lunches have always conflicted with my class times, sine they overlapbith morning & afternoon sessions.   | 5/27/2018 11:03 PM |
| 73 | Thanks for the work to resolve the overcrowding issue. I have a volunteer obligation on Tuesdays from 9-1, hence I can never attend as the meetings are now configured. If the outcome of your study is to have meetings at various times throughout the year, I would be able to attend.   | 5/27/2018 10:55 PM |
| 74 | Glad you are thinking of making a change. I was disappointed 3 times this year when the lunches were full. Also, the time conflicts with AAUW St Paul   | 5/27/2018 10:16 PM |
| 75 | As a recent retiree, I find it interesting that we meet during the academic year when many retirees go to warmer climates and return to Minnesota for the summers. The winter weather can make attending less attractive. If we meet during the summer, it might be easier to rent the west wing for our lunches. The afternoon meetings is worth trying out, however I want to avoid rush-hour traffic. Some of the older ,embers may not want to drive after dark.  | 5/27/2018 10:01 PM |
| 76 | I appreciate the work of this group and I am very happy to be part of it. I look forward to trying to attend more events next year.   | 5/27/2018 9:55 PM  |
| 77 | Since member consensus is to have a meal plus a speaker, I suggest that UMRA stay with that format, preferably at noon in the West Wing. For those wishing to socialize, I suggest creating a social committee or group to arrange gatherings (CC or elsewhere) similar to the UMRA Book Club. I consider the workshops an educational opportunity and I also suggest an educational committee to arrange workshops as a separate member opportunity similar to the camera club, book club, and the finanacial interest group.  | 5/27/2018 9:51 PM  |
| 78 | Find an alternate venue with decent parking and location.   | 5/27/2018 9:50 PM  |

|    |   |                   |
|----|---|-------------------|
| 79 | I am not familiar with the West Wing venue, so it's hard to compare.  | 5/27/2018 9:41 PM |
| 80 | Need a larger venue.  | 5/27/2018 9:40 PM |
| 81 | No additional comments.   | 5/27/2018 8:51 PM |
| 82 | The cost of the May mtg/appetizers last week was \$30. It was announced at the May mtg that the cost of lunches would increase to \$20 next year. I think some clarification would be helpful. Would the cost for the appetizers at the Sept., April and May UMRA mtgs be \$20? 30? Would there be an open bar at all of the UMRA mtgs that are held in the West Wing? Is the cost of making that service available (even though a cash bar) one of the reasons why the May mtgs cost more? If no open bar is available, as when mtgs are in the ABC rooms, would the cost be \$20 whether held in either the ABC or West Wing areas? | 5/27/2018 8:51 PM |
| 83 | I appreciate your trying to find a bigger venue. A 5:00 PM speaker would be a challenge for me, though I imagine I might stay that late once in a while.  | 5/27/2018 8:47 PM |
| 84 | Need more space for the luncheons; luncheon prices are too low. Late afternoon meetings would place attendees in the afternoon traffic mess.  | 5/27/2018 8:44 PM |
| 85 | More space would be good and good food is always important. The most important however is to keep the high quality speakers you always have had at these sessions.  | 5/27/2018 8:27 PM |
| 86 | Having an hour between workshops and speaker is not a good idea. I would attend workshop if just before or within 30 minutes. A hour is too long.   | 5/27/2018 8:13 PM |
| 87 | It should be possible to hear a speaker w/o attending the luncheon. Perhaps have the speaker talk in a larger separate room.  | 5/27/2018 8:12 PM |
| 88 | Having additional space and the ability to circulate will be heavenly!  | 5/27/2018 8:09 PM |
| 89 | A possible option would be to schedule the West wing once a month and direct the regular luncheon guests to ABC or schedule the UMRA luncheon at 1. Most people on campus have a regular 12:00 lunch time so would be out of the West Wing by 1. Might be a problem but could be worked out, I would think for one day a month.   | 5/27/2018 8:04 PM |
| 90 | I am pleased that you are experimenting with the proposed changes. By next year, we will know what is the best venue & format going forward. The luncheon works best for me due to traffic & I try to avoid rush hour traffic since live on the east side of St. Paul. However, I support the new proposed schedule.  | 5/27/2018 8:02 PM |
| 91 | I would encourage you to look for an off campus location. If it is convenient, I think additional members with mobility issues would attend. Thank you for considering this observation. I know it is difficult to make decisions that work for everyone. Best wishes and thanks.   | 5/27/2018 7:55 PM |

## UMRA: A Synopsis

July 2018

The University of Minnesota Retirees Association (UMRA) was founded in 1976 as an outgrowth of the Campus Club. It is an independently incorporated nonprofit which, as stated in its bylaws, “represents to the University of Minnesota the interests of retired faculty and staff and develops and encourages retirees' participation in and service to the University's programs.” Membership is open to any retiree from the University of Minnesota (faculty, P&A, Civil Service, or bargaining unit), the partner of any retiree, or the partner of a deceased retiree. Retirees may have worked on any University of Minnesota campus, although the overwhelming majority of members either worked on the Twin Cities campus or have since moved to the Twin Cities area. (The Morris campus has its own retirees' organization, which is entirely independent of UMRA.)

### Structure

#### *Relationship to the University*

UMRA's main tie to the U of M is through the Provost's office. UMRA draws on support from other units as well, such as the Campus Club, the Office of Human Resources, the Library system, the Office of the Vice President for Research, and the Office of Information Technology.

#### *Board and Officers*

UMRA is governed by a Board of Directors and officers elected by the membership at an annual meeting in May. Officers are the president, president-elect, past president, secretary and president, all of whom serve on the board along with twelve members elected four at a time for staggered three-year terms. The board and executive committee both normally meet monthly during the academic year except in December.

#### *Committees*

Much of UMRA's work is carried on by standing committees, whose members are technically appointed by the president, but in practice usually by their chairs. The present list of committees is as follows:

- Executive: Consists of the elected officers, chaired by president. Develops board agendas, coordinates work of committees, serves as short- and long-range planning committee.
- Program: Chaired by president-elect. Recruits and supports speakers for monthly meetings during academic year.
- Workshops: Arranges Living Well in Later Life workshops in conjunction with most monthly meetings.
- Social Activities: Programs additional member activities (social events, tours, etc.) on an irregular timetable.
- Membership: Recruits new members, manages membership database and discount program.
- Communications and Outreach: Provides oversight and guidance to newsletter editorial team and website team, and seeks to raise UMRA's profile in the university.
- Luncheon: Handles logistics of luncheons, including menus, nametags, fee collection.

- Grants: Oversees annual professional development grants for retirees, including publicity, selection, and fundraising.
- Nominating: Annually proposes a slate of officer and board candidates to the membership. Chaired by past president.
- UMRA History: Compiles and organizes material for an annual UMRA contribution to the University Archives.
- UMRA Cares: Provides support to spouses/partners and families grieving a death or coping with hospitalization or disability.
- Council of Past Presidents: Chaired by immediate past president. Advises president and board upon request.

### *Task Forces*

These are temporary committees appointed by the president and designed to disappear upon completion of their assigned tasks. Recent examples include a Luncheon Venue Task Force, a Retreat Planning Task Force, a Communications and Outreach Task Force, and a Social Activities Task Force. (The last two of these evolved into standing committees upon completion of their initial work.)

### *Affinity Groups*

These are informal, self-governing subgroups of the UMRA membership organized around a common interest. After board approval of their establishment, each group defines its own focus, activities, and leadership. At present they include the following:

- Photo Club: Meets monthly during academic year, except December, to share photos taken, discuss various aspects of photography, and organize an occasional photo shoot.
- Book Discussion Club: Meets monthly except December to discuss a book previously read by all, and to choose future readings.
- Retiree Financial and Legal Issues Group: Meets three or four times a year to discuss issues of interest to members, often with an expert facilitator
- JOIE: Manages online Journal of Opinions, Ideas, and Essays, which permits retirees (and others) to publish articles and creative work that do not fit easily into conventional academic journals.

### *Liaisons and Representatives*

The president appoints representatives and liaisons alike. The distinction between the two is that representatives have voting privileges in the recipient body and liaisons do not. Currently UMRA sends representatives to the following:

- Senate Committee on Faculty Affairs (SCFA)
- Senate Subcommittee on Retirement Plans
- Health Care Benefits Advisory Committee (2 representatives)
- University Retirees Volunteer Center Board of Directors
- Civil Service Senate
- Campus Club Board of Directors

Liaisons attend the following:

- Board of Regents
- Alumni Association
- P&A Senate



The following organizations appoint liaisons to UMRA:

- Provost's Office (currently 2 liaisons)
- University Retirees Volunteer Center (URVC) Board of Directors

## **Activities**

In addition to the activities involved in governance (officers, board, committees, representatives and liaisons) and those of the special interest groups, UMRA offers the following activities to interested members:

### *Monthly gatherings*

These are held from September through May with the exception of December. They are open to all members, although space capacity sometimes proves a limiting factor. At present all are held in the Campus Club (fourth floor Coffman Union on the East Bank of the Minneapolis Campus).

Although most are held over the noon hour and into the early afternoon, UMRA has begun experimenting also with late afternoon formats. The May gathering includes UMRA's annual business meeting. Gatherings include the following components:

- Social time prior to formal activities (a relatively recent addition, growing in popularity)
- Luncheon (or, for afternoon meetings, an appetizer buffet)
- Program (almost always an invited speaker)
- Workshop (after speaker for noon meetings, before for afternoon meetings); these tend to draw an average of about a third of total attendees

### *Other UMRA-wide activities*

Over approximately the past two years the Social Activities Committee has been creating opportunities for member involvement beyond the traditional monthly meetings and the activities of the special interest groups. These have included Campus Club offerings (at which UMRA participants have an assigned table) and tours (e.g., of the Athletes Village, the University Arboretum, or the State Capitol). The range of activities is likely to expand in the future.

### *Linkages to similar organizations:*

UMRA sends representatives to meetings of the following:

- Big Ten Retiree Associations (annual meeting)
- AROHE, the Association of Retirement Associations in Higher Education (biennial conference). Currently UMRA member Cherie Hamilton also serves on the AROHE board.

## **Key documents**

The UMRA website includes the following:

*Governance documents* ([umra.umn.edu](http://umra.umn.edu) > About Us > Operational Documents)

- Bylaws: Basic governance structure and process for UMRA
- Memorandum of Agreement (signed spring 2016): Principles guiding UMRA's relationship with U of M
- Operating Document: Sub-bylaws-level description of how UMRA functions; designed to maintain organizational memory as personnel change over the years

- UMRA Personnel: List of current board, officers, committee members, representative and liaisons, and chairs of special interest groups

*Reports and minutes* (umra.umn.edu > About Us > Document Archives)

- Treasurer's reports
- Board minutes

*UMRA history* (umra.umn.edu > About Us > UMRA History)

- UMRA History 1976-1983: Account of UMRA's founding and early years
- UMRA Officers 1992-2018: List of all officers since 1992
- UMRA Board 1993-2018: List of all board members since 1993
- UMRA Luncheon Speakers 2004-2018: List of all speakers since 2004
- UMRA Workshops 2005-2018: Lists all workshops since 2005 (nearly all since 2012, when regular workshops began)

### **Some potential issues for next year's board, officers, and committees**

Among the many tasks/issues that will arise, some of them impossible to anticipate at present, the following may merit attention in the coming year:

*UMRA operations:*

- Venue, time of day, and type/amount of food for monthly meetings: Seeking long-term solution
- Getting new members to continue after their first (free) year
- Newsletter issues, incl. editor stipends
- Website: What can make it more user-friendly?
- Member listserv: How much traffic should it have?
- Representative/liaison relationships: Are any not worth maintaining? Should we seek to add any?
- Conflict of interest policy: Do we need one?
- Leadership of Cares Committee (Ron Anderson wants to step down)

*Fostering continuity*

- Board orientation: How can it be systematized?
- "Crib sheets" (how-to documentation) for selected positions (esp. officers and committee chairs): Can we develop them systematically?
- "Apprenticeships": Could we designate, and provide experience to, backups for a few key positions?

*Activities and external relations*

- Advocacy, capital campaign, & the U of M Foundation
- Serving needs of older and/or less mobile members
- Expanding number and variety of activities available to members
- MGS (Minnesota Geneological Society) relationship (incl. links from UMRA website)
- Tracking Pillars of Prospect Park Senior Housing development

Retreat attendee list as of 8/7/18:

Ron Anderson <rea@umn.edu>,  
Chip Peterson <c-pete@umn.edu>,  
William Donohue <donohue@umn.edu>,  
Lynn Anderson <boundarywaters07@gmail.com>,  
Vernon Cardwell <cardw001@umn.edu>,  
Cathy Lee Gierke <leegi001@umn.edu>,  
Jeanne Markell <marke002@umn.edu>,  
Kathleen O'Brien <kobrien@umn.edu>,  
Claudia Parliament <cparliam@umn.edu>,  
Richard Poppele <dick@umn.edu>,  
Gloria Williams <gwilliam@umn.edu>,  
Judith Grimes <Jleahy4654@aol.com>,  
Frank Cerra <cerra001@umn.edu>,  
Cherie <pimentamalageta@hotmail.com>,  
Gayle Graham Yates <graha001@umn.edu>,  
Jean Kinsey <jkinsey@umn.edu>,  
John Anderson <ander049@umn.edu>,  
Virginia Hanson <hanso045@umn.edu>,  
A. Kristine Mortensen <kristinemortensen@gmail.com>,  
Terry Roe <troe@umn.edu>,  
Patricia Tollefson <p-toll@umn.edu>,  
Craig Swan <swan@umn.edu>,  
Andy Whitman <awhitman@umn.edu>,  
Dale Swanson <swanson@umn.edu>,  
Ron Matross <rmatross@gmail.com>,  
Peggy Mann Rinehart <rineh002@umn.edu>  
Jerry Rinehart <g-rine@umn.edu>

**(Note:** Invitees included outgoing and incoming officers and board members, committee chairs, representatives and liaisons, newsletter editor, webmaster, database manager, and all living past presidents. Many participants fell into two or more of these categories.)