

## UMRA Retreat, 11 August 2016

### Title: UMRA's Mission and Vision: Steps Moving Forward

*Goal:* To provide direction to the UMRA Board for their deliberations about membership strategy and involvement and outreach with the larger University and the community.

#### *Takeaways:*

- (a) Recommended direction on membership size and scope of activities
- (b) Topics for UMRA Board discussion/decision in 2016-2017.

### **UMRA Retreat Agenda:**

9:30 Arrive, breakfast snacks and coffee

9:45 Introduction to the agenda and the goals of the retreat – Jean Kinsey

10:00 Get-acquainted exercise – Jeanne Markell

10:20 Review Trends in Membership – John Anderson  
Review Results of 2016 UMRA Survey of Members – Jeanne Markell

11:00 Introduce Moderator – Jerry Rinehart; Scribe – Julie Medbery  
Discussion Topic 1: Membership Strategy (See subtopics below)

#### **Scenario One:**

UMRA Board should seek to broaden the activities, events, deliverables and University involvements for its members but let its growth in numbers grow organically.

#### **Scenario Two:**

UMRA Board should grow membership numbers more aggressively and consider broadening the activities, events, deliverables and University involvements for its members.

12:00-12:30 Lunch served – break

12:31 – 1:00 – Summary of discussion of Topic 1: Direction for growth and questions for the UMRA Board address in next 2 years.  
Identify volunteers to work on specific issues.

1:01 Topic 2: What does it mean to be “in service to the University?”  
How can/do we support the mission of the University? (John Adams’ insights/progress)  
Linkages with other U organization e.g. Alumni Assoc., Foundation  
Do we want to advocate for the programs of these organizations?

2:15 Summary of discussion for Topic 2: Direction for involvement with the University and questions for the UMRA Board to address in next 2 years. Identify volunteers to work on specific issues.

2:30 Revisit UMRA strategy in light of the day's discussion

3:00 Adjourn

Notes:

**Scenario One:**

- UMRA continues to strive for the status quo in terms of size of its membership (around 500)
- Continue using current methods of reaching out to potential members (HR lists, word of mouth, U of M retiree planning workshops)
- Invest board efforts not so much at growth of membership but rather at organization's deliverables to members and to the University.

**Scenario Two:**

- UMRA sets a goal of more aggressive membership recruitment and determines strategies to get there
- Consider broadening the definition of membership to include folks who may not have "retired" but consider the U of M their primary career affiliation
- Invest board efforts in planning for growth, including impacts on venues, resources and marketing and communications plans

**From our Web site:**

UMRA Mission

The mission of this association shall be to promote, protect, support, and advocate for the interests, rights, needs and welfare of persons who retire from the University of Minnesota. More specifically, UMRA goals are:

- To help retirees successfully deal with the retirement process, both during their retirement year and into their retirement years;
- To provide all retirees broad intellectual stimulation as well as social and recreational services;
- To oversee and assist in the ongoing provision of benefits affecting the health and wellness of retirees;
- To facilitate opportunities for voluntary service to the University and community;
- To contribute to the development and welfare of the University and its mission and goals.

**From our MOU with the UMN (yet to be signed):**

WHEREAS, UMRA is a dues-paying, membership organization dedicated to connecting retired faculty and staff (P&A, Civil Service, & Bargaining Unit employees) of the University and their spouses in lifelong, *mutual support of the University* and each other;

Handouts:

Membership Trends, Membership graphs

Survey Summary

UMRA Financial Status

John Adams Vision

MOU

Brochure

## **John Adams' Newsletter Column from Oct. 2013.**

### **FROM THE PRESIDENT**

A year ago during our UMRA Board Retreat we decided to refine and implement the theme: "University Retirees as University Resources," prompting the question: "OK, how do we make that happen?" During the past year, with guidance from former presidents Ron Anderson and Gayle Graham Yates, we worked with senior University officials to advance UMRA's long-term effort to establish a University Retirees Center. At our board retreat in August 2013 we restated our theme for the current year as "Retirees as University Resources," and restated our goal to establish a retirees center.

Discussions with University officials Karen Hanson, Andrew Furco, Arlene Carney, and UMRA committees disclosed challenges confronting our proposal to establish a center at this time. Not only are formal protocols for establishing a new University center complex, but also President Eric Kaler has begun a review of University organization while questioning the U's large number of different departments, programs, centers, institutes — even colleges.

In light of the president's views and his implementation of a University long-range planning effort, Provost Hanson suggested undertaking, with her support, an intermediate set of activities that would strengthen interactions between the University and its retirees, while taking steps toward tying UMRA closer to the University and the provost's office (UMRA is currently an independent 501(c)3 organization). One example of such activities is a series of workshops for retirees to be held on campus and jointly sponsored by the provost's office and UMRA. Ron Anderson leads this initiative.

Across the U.S. there is rethinking under way about what retirement means these days. Not only are retiree organizations re-examining missions and programs, but also a burgeoning scholarly literature explores myriad aspects of retirement. What once was an event (i.e., retire and leave) is now a process that can start months or years before the final paycheck (when the parking space disappears) and extends for years beyond employment.

I've begun a series of meetings with college deans asking how they deal with employees as they retire. Do colleges sponsor events for each year's retirees—faculty, P&A, staff, union members—thanking them for their service and encouraging them to remain connected in various ways with the University? Turns out that practice varies. More should be done along these lines, so I suggest to them that UMRA stands ready to help colleges develop and implement programs for retiring employees. I hope to reach several deans before year's end, offer to help, and then bring what I learn to our UMRA board for planning and action.

Meanwhile, planning continues for UMRA and the University to host meetings of two retiree organizations in August 2014: (1) the annual meeting of the association of Big Ten retirees organizations, and (2) the biennial meeting of the Association of Retiree Organizations in Higher Education (AROHE). John Anderson is local arrangements chair for the Big Ten meeting, and Ron Anderson is our link with AROHE's local arrangements committee.

Both meeting programs will work with the theme: "Universities and Retirees: Building Connections." Meetings will occur back to back and will highlight what's happening here at Minnesota while we learn about best practices elsewhere.

— John S. Adams, UMRA President [adams004@umn.edu](mailto:adams004@umn.edu)

# Emeritus Professors Make a Case for Campuses to Tap Their Talents

By Audrey Williams June – June 03, 2016



James Murphy (middle), an emeritus professor at the U. of California at Davis, stays busy at 92, attending the Rhetoric Society of America's meeting last month in Atlanta.

When James (Jerry) Murphy retired as a professor of English and rhetoric at the University of California at Davis, his plan, he says, was "not to work very hard."

That may be what some people expect of emeritus faculty members, but Mr. Murphy's idea of retirement was a bit busier than that. Since he retired, in 1991, he has written, edited, or revised six books, been guest editor of a journal, lectured at colleges large and small, and occasionally served on dissertation committees.

A prominent scholar of rhetoric and the history of language use, he still, at 92, attends conferences like the Rhetoric Society of America's last month, where he and a colleague held a highly anticipated discussion of whether current rhetorical terms reflect new concepts or merely rename old ideas.

For Mr. Murphy, a pull toward scholarly endeavors is almost instinctive. "People who are scholars are doing something in an area that they're personally interested in," he says. "It's not unnatural for them to want to keep doing what they were doing."

Related Content

[Senior Professors: Not When to Retire, but How](#)

['We'll Work for Free,' Say Retired Professors, but Colleges Struggle With How to Use Them](#)

[Colleges Explore New Ways to Manage Retirements](#)

Often there's no measure of how emeritus faculty members spend their time or what they contribute. And general impressions may stir the professors' feelings of obsolescence. Some retired academics would like to be recognized for their work and engaged more often on their campuses.

A recent survey of emeritus professors in the University of California system seeks to show just how productive they have been, touting such tallies as 500 books, 3,000 journal articles, and 2,500 conference papers over a three-year span.

Responses from about 1,600 emeritus professors on all but one of the system's 10 campuses — about a quarter of the whole group — demonstrate that the amount of research, publishing, teaching, mentoring, and service performed by just that fraction of them is equivalent to a "virtual 11th campus," a report on the findings says.

"Lots of academics feel a sense of loss when they retire. What this shows is that people who want to continue working can find ways to do that."

That message is meant for the system's full faculty and administration, as well as the emeritus professors themselves. "Lots of academics feel a sense of loss when they retire," says John L. Vohs, author of the report and a senior lecturer emeritus of communication at Davis. "What this shows is that people who want to continue working can find ways to do that, and they're making a huge contribution to the UC system."

Taking stock of what emeritus faculty members are up to, which the Council of University of California Emeriti Associations has done since the late 1990s, is partly

a way to stoke a sense of professional pride. And detailing their value for administrators can help make the case that emeritus professors — who are also subject to institutional austerity measures like benefit cuts — still have plenty to offer.

"This survey provides some really interesting talking points to catch the attention of leadership," says Patrick Cullinane, president of the Association of Retirement Organizations in Higher Education, which promotes to colleges the benefits of tapping the talents of retired faculty and staff members. "Since all of these people are retired, they're not really on the books. Yet they continue to contribute meaningfully to the mission of their universities."

### Keeping Busy

What it means to be an emeritus professor depends on the institution. Some colleges award the title more freely, while elsewhere it's not guaranteed. Neither are benefits like office space, a parking spot, research money, or a nominal fee for teaching.

At the University of California, where the status is conferred on any retired associate or full professor, the survey captures a wide range of activities that make up their post-retirement lives. Almost 60 percent of respondents reported writing and publishing sometime in the three-year span the survey covered (2012-15), and slightly more said they had academic publications or presentations in progress. Beyond that, many reported either consulting or serving on an editorial board.

It's no surprise that recent retirees are the most connected to the careers they've built over several decades. About three-fourths of professors who retired in the last five years said they had academic work in progress, perhaps winding down labs, grants, and relationships with graduate students, as professors in early retirement tend to do, Mr. Vohs says.

But roughly half of the 279 respondents in Mr. Murphy's cohort — those who took emeritus status in the early to mid-1990s — were still engaged in research and writing during the period included in the survey.

Retired professors often spend time serving their colleagues and institutions. Just under half of the emeritus faculty members reported serving as mentors who provided career advice or other counseling to students and faculty members. A similar share held service commitments on their campuses or in the university system.

And although professors everywhere talk about retiring partly to escape grading papers, some still inhabit the classroom. Respondents to the survey taught 866 undergraduate courses and 739 graduate courses on UC campuses over the three years.

"There are people who really would like to teach more, but they don't have the opportunity to do that."

That's like 335 full-time faculty members, Mr. Vohs says, each with a teaching load of five courses a year.

"A number of people told us they got called back to fill in for a professor who was on maternity leave or somebody who went on sabbatical," he says. "There are people who really would like to teach more, but they don't have the opportunity to do that."

Since retiring, in 2008, James N. Danziger, a professor emeritus of political science at the University of California at Irvine, has taught one or two courses a year for his department. The lighter load has let him teach three times so far in the Semester at Sea, a study-abroad program on a ship.

"Now I have much greater flexibility," says Mr. Danziger, who is also revising the 12th edition of a textbook he wrote.

Irvine's Emeriti Association is working on a report that highlights the productivity of retired faculty members there, says Mr. Danziger, president-elect of the group. Top administrators, deans, and even department chairs, he says, "have a fragmented idea of what we're doing on campus."

Seeing the data on paper, he thinks, will help. So will suggestions like a list of emeritus professors willing to give talks on their area of expertise or to mentor graduate students.

Mr. Danziger wants emeritus professors to be better recognized and used. In presenting the data on what they contribute, the plan is to integrate retired faculty members more consistently into campus life.

*Audrey Williams June is a senior reporter who writes about the academic workplace, faculty pay, and work-life balance in academe. Contact her at [audrey.june@chronicle.com](mailto:audrey.june@chronicle.com), or follow her on Twitter [@chronaudrey](https://twitter.com/chronaudrey).*

**<http://chronicle.com/article/Emeritus-Professors-Make-a/236693>**

# **One Idea to Ease Faculty Into Retirement: the ‘Terminal Sabbatical’**

By Vimal Patel, *Chronicle of Higher Education*, July 26, 2016

Retirement incentives like buyouts "really do work," says Julie Wollman, president of Widener U. She hopes that a new kind of incentive at Widener will help the university reshape its budget.

Faculty members can work as long as they want, a right that began with the end of mandatory retirement in 1994. Many haven't been shy about exercising that right, and the American professoriate is decidedly grayer than a generation ago.

This creates complications for colleges, including by limiting their flexibility in making decisions about budgets and about academic programming. It also exacerbates job-market pressures for some new Ph.D.s who see a glut of aging scholars contributing to the dearth of job openings. All this was on the minds of Widener University administrators when they conceived of a new option they'd like to begin offering soon: the terminal sabbatical.

The idea is to allow eligible faculty members — based on years of service — to take a one-year sabbatical from which they would then retire, without returning to the faculty. Julie E. Wollman, Widener's president, says she hopes such a program would encourage more professors to retire by easing their transition out of campus life. That, in turn, would free up money in the budget and allow administrators to more nimbly shift money to emerging priorities.

“Institutions need to look at things differently so that retirement is not like stepping off the edge of a cliff.”

Administrators are just beginning to sketch out the specifics of their idea, and to pitch it to faculty, but they envision that a professor who takes a terminal sabbatical would continue to receive a salary and benefits for one year while doing the kind of work one would do on a typical sabbatical, like research and writing. The sabbatical might also include some form of service to the university, like performing an analysis of a proposed program or helping to revamp curricula.

Offering a structured sabbatical program at the end of a professor's academic career is unusual, says Janette C. Brown, executive director of the Association of Retirement Organizations in Higher Education. Many colleges, though, are paying more attention to easing tenured faculty members' transition into retirement. Phased retirements, in which professors work progressively fewer hours for one or more years, are common.



The University of Southern California, where Ms. Brown is assistant vice provost of the Emeriti Center, hired a faculty retirement "navigator" two years ago to serve as a confidential advocate and resource for faculty members who are retiring or considering retirement. Ms. Brown's center tries to keep retired faculty members engaged with their university by promoting part-time or volunteer work on the campus and encouraging retirees to be part of a living-history project.

A goal of Widener's is to reduce the psychological toll of retirement by creating a yearlong transition period.

"Faculty are fearful of losing their identity," Ms. Brown says. "Institutions need to look at things differently so that retirement is not like stepping off the edge of a cliff. Colleges are not quite getting that yet, but they're slowly beginning to come around."

### **How to Avoid Distrust**

At Widener, administrators say they want to bring more openness to the process of retiring. Retirement incentives tend to breed distrust, with professors suspecting that a colleague is getting a better deal. And the lack of clear information can make people wonder whether they should hold out until an incentive like a buyout program comes along.

In fact, Widener administrators and faculty-retirement experts say the increasing availability of retirement incentives, including buyouts, has led to an unintended consequence: Faculty members now expect them and linger on to avoid missing one that may be just around the corner. Ms. Wollman says adopting a defined program, like the terminal-sabbatical idea, that is available to all eligible faculty members would make the process more transparent.

"We want to continue to incentivize retirement," Ms. Wollman says, "but we don't want this kind of ad hoc process that begins to seem inequitable because it's only in certain areas and some people get more than others."

Widener recently offered buyouts to selected groups of faculty, most in law and business. Administrators say the buyout programs, in which faculty members were given a year or more of salary in exchange for retiring, show that faculty do respond to retirement incentives. In all, about 50 professors took the offers during programs this year and in 2013, a significant chunk of the faculty. Widener now has 235 tenured or tenure-track faculty members.

Sometimes the goal of the buyouts is downsizing, while other times it's creating flexibility in the budget. At the law school, Widener wanted to cut costs amid shrinking enrollments, a nationwide trend at law schools; Widener's dropped 37

percent from the fall of 2012 to the fall of 2015, when the school enrolled about 800 full-time-equivalent students. At the business school, the goal of the buyouts was to shift direction by using the money saved on retiring professors to hire new faculty in in-demand areas like finance, which saw an increase in undergraduate majors.

"The evidence from our university and others," Ms. Wollman says, "is that these things really do work."

### **Making Retirement Attractive**

Not all retirement incentives are created equal. And it remains to be seen whether terminal sabbaticals — which wouldn't come with a year of salary for no work like a buyout does but rather a year's salary in exchange for working on a project — would have the same appeal to professors.

Three years ago, when he was 64, Michael J. Goldberg, a Widener law professor, could have taken a buyout but didn't, because he felt had a few good years of faculty service ahead of him. He also wasn't old enough to qualify for university health insurance for retirees. This year, for two full years of his salary, he took the offer. "I wasn't dying to leave the work and I'm still good at it, I'd like to think," Mr. Goldberg says. "I don't know whether one year would have been enough of an incentive."

Mr. Goldberg says he also would have considered taking a terminal sabbatical for one year of his salary. "It certainly would have been attractive," he says. "I don't know what I would have done."

But administrators recognize that there are many others, like David Ward, a 67-year-old Widener philosophy professor who has no intention of retiring, who won't be swayed by a terminal sabbatical or any other incentive. Mr. Ward says he enjoys his work too much to quit.

"I get paid for reading interesting books and talking about interesting topics," he says. "Why would I quit that?"

Even so, he's a supporter of terminal sabbaticals. He knows faculty members who no longer share his passion for the work, and who might be better off doing something else but hang on for the security of a paycheck.

"There are professors who burn out, get frustrated at the quality of students, or just lose interest," Mr. Ward says. "The students aren't getting the best, the discipline isn't getting the best, and the faculty member isn't having any fun. In those cases, retirement incentives are a win for everyone."

At least one faculty member is already intrigued by the idea of a terminal sabbatical. Raymond Jefferis has been a Widener engineering professor for more than half a century. He didn't waste time thinking up a proposal for his terminal sabbatical: writing a book on mechatronics, which is the intersection of mechanical engineering and electronics.

Mr. Jefferis, 78, loves creating things, whether it's devising a mechatronics course or inventing a metal detector for archaeological work. He has owned an electronics manufacturing company for 22 years, Mr. Jefferis says, so he doesn't need to keep working for the money. He would prefer taking a terminal sabbatical to ease him into post-academic life rather than taking two years of his salary as a buyout.

"If it weren't for a program like this," Mr. Jefferis says, "I would probably keep going till I dropped dead in class."

*Vimal Patel covers graduate education. Follow him on Twitter [@vimalpatel232](#), or write to him at [vimal.patel@chronicle.com](mailto:vimal.patel@chronicle.com).*

**<http://chronicle.com/article/One-Idea-to-Ease-Faculty-Into/237249>**

# **Characteristics of UMRA**

**June 2016**

**Prepared for August 11 Retreat**

# Member Prior-Employment Categories

June 2016

	<u>Singles</u>	<u>Couples</u>	<u>Total</u>	<u>Percentage</u>
Faculty	136	116	252	55
Civil Service	69	20	89	20
P & A	18	52	70	16
Bargaining Unit	7	2	9	2
Spouse	13	-	13	3
Not Specified	<u>15</u>	<u>3</u>	<u>18</u>	<u>4</u>
Total	258	193	451	100

# Retiree Prior-Employment Categories

UMTC Retirees - Jan 2013 through May 2016

Acad Prof and Admin	146	}	245	P&A
Academic Administrative	36			
Academic Professional	63			
Civil Service	134	}	220	Civil Service
Civil Svc-V Class	86			
Civil Svc/Barg Unit	238		238	Barg Unit
Faculty	129	}	280	Faculty
Faculty - Contract	9			
Faculty - Regular	142			
Federal Benefits	13	}	138	Misc.
LR - Clerical	43			
LR - Health Care	4			
LR - Police	1			
LR - Service & Maintenance	29			
LR - Technical	14			
LR - Trades	6			
Not Benefits Eligible	17			
Temp Casual	1			
UMN Extension Service/Fed	10			
	<u>1121</u>			

## Response to Recruitment Mailings

Year	Number of TC retirees	Number joined UMRA	Percentage
2013	220	24	10.9
2014	289	20	6.9
2015	402	59	14.7
2016 (Jan-May)	(210) <hr/>	(6)	-
	1121		

Three year response - 11.3%

# Member Registration for Luncheons

Sept 2015 - May 2016

<u>Lunches</u>	<u>Singles</u>	<u>Couples</u>	<u>Members</u>	<u>People</u>
8	10	3	13	16
7	11	7	18	25
6	7	4	11	15
5	12	5	17	22
4	11	6	17	23
3	15	4	19	23
2	22	10	32	42
1	49	24	73	97
<b>Total</b>	<b>137</b>	<b>63</b>	<b>200</b>	<b>263</b>

**44% of Members participate in luncheons**



# Year Joined UMRA

1978	1	1991	3	2004	12
79	-	92	7	05	18
80	-	93	7	06	8
81	-	94	7	07	15
82	1	95	5	08	20
83	-	96	10	09	27
84	-	97	9	10	25
85	1	98	11	11	17
86	2	99	9	12	34
87	1	2000	10	13	27
88	5	01	8	14	36
89	5	02	7	15	62
90	4	03	10	16	27
				Total	451

# **Residence of UMRA Members**

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

<b>AR</b>	<b>CA</b>	<b>CO</b>	<b>FL</b>	<b>LA</b>	<b>MA</b>
<b>MI</b>	<b>MO</b>	<b>NM</b>	<b>OR</b>	<b>TX</b>	<b>WA</b>

**1 member has address in Ely, MN**

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

# **Parking Discount Coupon Distribution**

**20,000 coupons distributed since June 2011**

- distributed at luncheons**
- sent with membership renewals**
- sent by mail in response to requests**

**Mail distribution of 20 or more coupons per member**

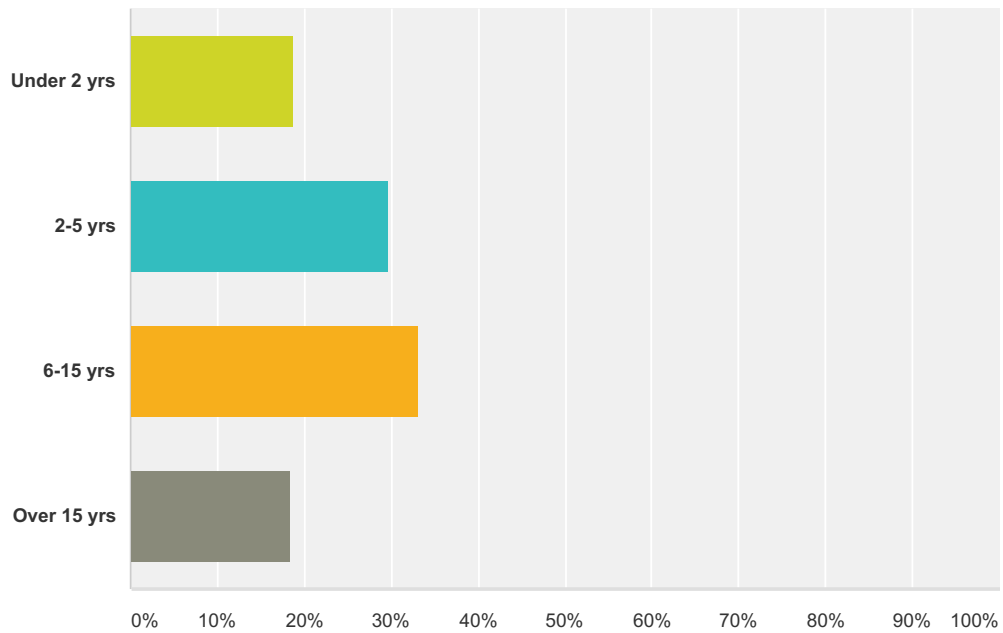
**Since May 1, 2015, 27 persons have obtained 1484 coupons**

- 7 attended 17 luncheons - obtained 167 coupons**
- 20 attended no luncheons - obtained 1317 coupons**

**Conclusion: parking discount coupons key to  
some membership applications**

### Q1 How many years have you been a UMRA member?

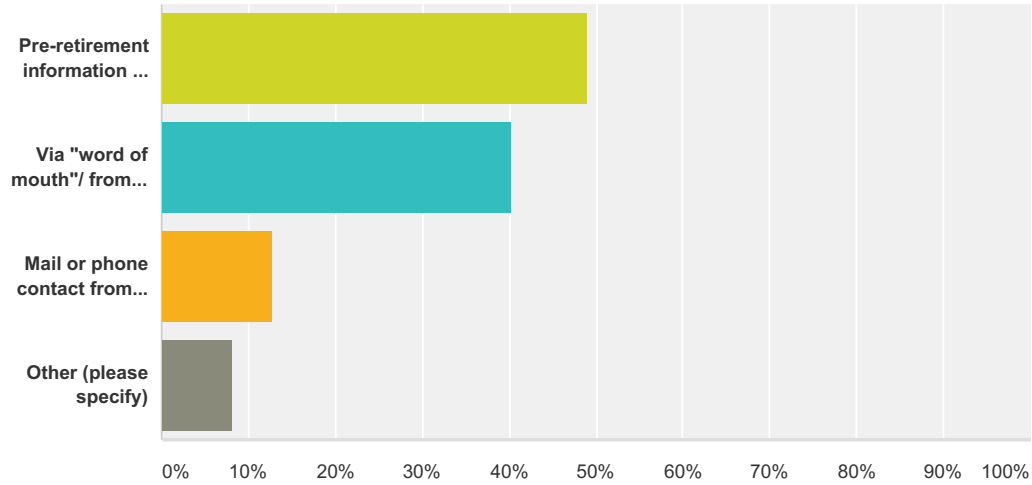
Answered: 196 Skipped: 1



Answer Choices	Responses
Under 2 yrs	18.88% 37
2-5 yrs	29.59% 58
6-15 yrs	33.16% 65
Over 15 yrs	18.37% 36
<b>Total</b>	<b>196</b>

### Q2 How did you learn about UMRA?

Answered: 196 Skipped: 1

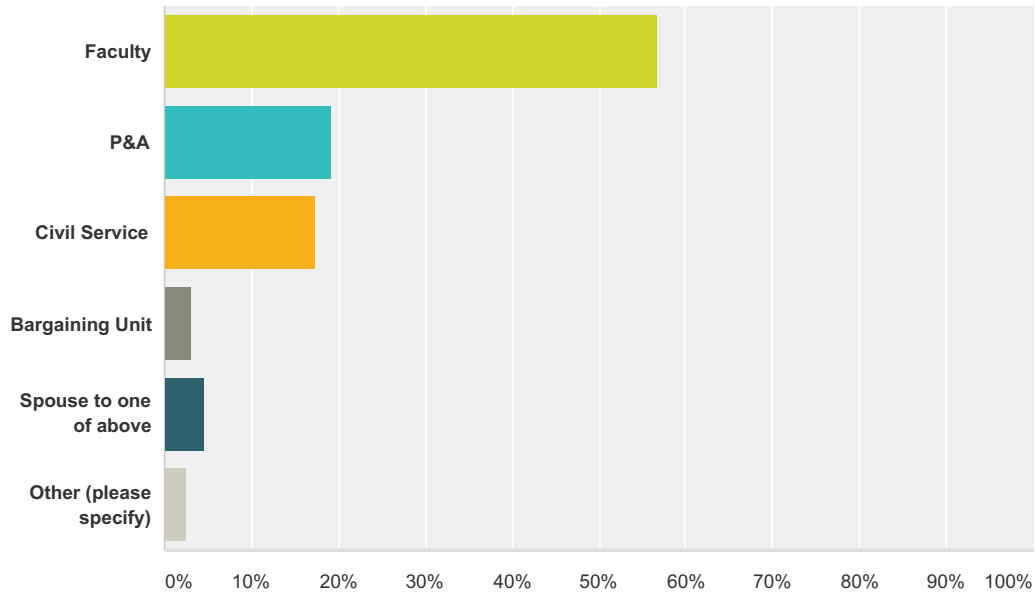


Answer Choices	Responses
Pre-retirement information at the U of MN	48.98% 96
Via "word of mouth" from a friend or colleague	40.31% 79
Mail or phone contact from UMRA	12.76% 25
Other (please specify)	8.16% 16
<b>Total Respondents: 196</b>	

#	Other (please specify)	Date
1	joined with my husband who retire from the U of M	7/25/2016 12:38 PM
2	through my husband	7/25/2016 12:35 PM
3	I joined when I retired in 2009	7/25/2016 12:24 PM
4	Generally aware of it for years before retirement	7/13/2016 7:05 AM
5	spouse of member	7/6/2016 11:56 AM
6	CEHD	7/1/2016 10:54 PM
7	Spoke at UMRA when I was a UMN administrator	6/30/2016 3:09 PM
8	I don't remember!	6/29/2016 9:00 PM
9	I don't remember	6/29/2016 11:56 AM
10	someone in Employee Benefits	6/29/2016 10:31 AM
11	I don't remember.	6/29/2016 9:28 AM
12	internet	6/29/2016 9:10 AM
13	UMRA website	6/29/2016 8:31 AM
14	As a member of the UMN retirement subcommittee	6/29/2016 7:17 AM
15	Not sure	6/29/2016 12:27 AM
16	Reception for recent retirees organized by John Howe	6/28/2016 7:28 PM

### Q3 What was your pre-retirement employment category at the U of MN?

Answered: 197 Skipped: 0

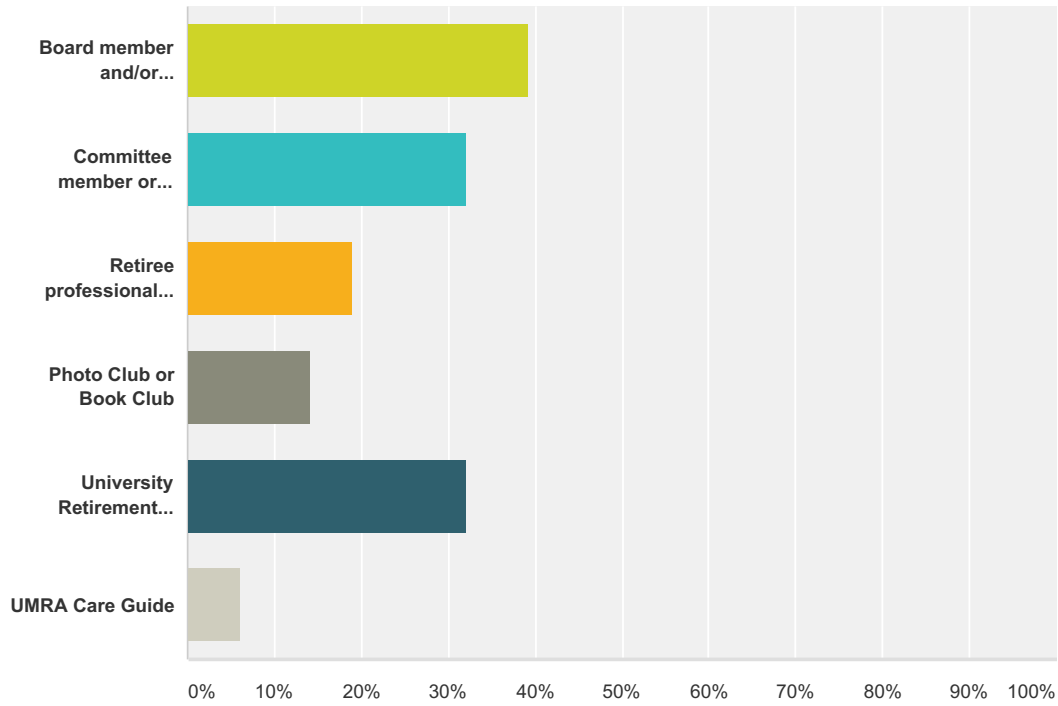


Answer Choices	Responses
Faculty	56.85% 112
P&A	19.29% 38
Civil Service	17.26% 34
Bargaining Unit	3.05% 6
Spouse to one of above	4.57% 9
Other (please specify)	2.54% 5
<b>Total Respondents: 197</b>	

#	Other (please specify)	Date
1	Spouse to retired faculty member	7/25/2016 12:43 PM
2	I did work part time as office ass't but did not retire from U of M	7/25/2016 12:38 PM
3	none	7/6/2016 11:56 AM
4	Civil Service with faculty retirement	7/2/2016 12:22 AM
5	Teacher	6/28/2016 10:01 PM

**Q4 Which of the following describe your past or present involvement as a UMRA member?(check all that apply)**

Answered: 84 Skipped: 113



Answer Choices	Responses
Board member and/or committee chair	39.29% 33
Committee member or project volunteer	32.14% 27
Retiree professional grant participant	19.05% 16
Photo Club or Book Club	14.29% 12
University Retirement Volunteer Center (URVC)	32.14% 27
UMRA Care Guide	5.95% 5
<b>Total Respondents: 84</b>	

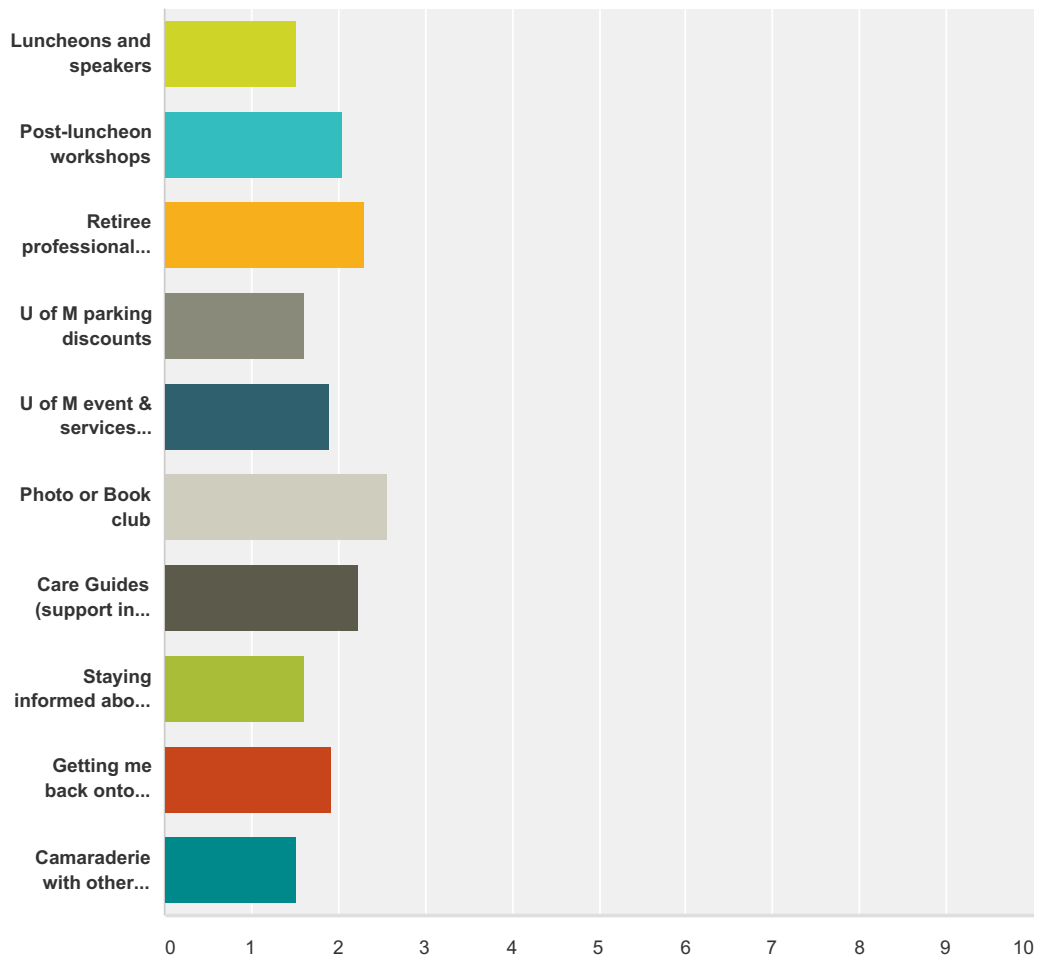
#	Comments:	Date
1	UMRA treasurer for 1 yr	7/25/2016 12:43 PM
2	My lack of involvement is a result of my reluctance to cope with parking. I have no physical disabilities	7/25/2016 12:41 PM
3	I'm a caregiver now so cannot attend things much	7/25/2016 12:38 PM
4	I really enjoy the luncheons	7/25/2016 12:29 PM
5	UMRA Cares book review. Luncheon Committee	7/10/2016 3:15 PM
6	Not very involved as I live in northern Minnesota	7/7/2016 11:55 AM
7	Have not been very active	7/5/2016 2:28 PM
8	I,ve never participated for moved to TX for 19 years just returned to MN will be 2 years in September	7/3/2016 9:59 PM
9	still working part time	7/3/2016 2:38 PM
10	Minimal involvement. Attended final lunch/mtg in May 2016.	7/2/2016 3:08 PM
11	None of above Left MN in 1992 Returned to MN in 2014	7/1/2016 4:29 AM
12	I have volunteered for health research projects.	6/30/2016 2:38 PM
13	None yet - too new, only a few months since retirement.	6/30/2016 10:01 AM

14	attendee at monthly meetings	6/30/2016 9:52 AM
15	attend monthly lunch meetings	6/29/2016 10:40 PM
16	N/A	6/29/2016 10:14 PM
17	so far, just a receiver of emails	6/29/2016 6:11 PM
18	No involvement as of yet	6/29/2016 3:25 PM
19	Volunteered w/ 2nd Harvest Heartland last fall but developed frozen shoulder & broke bone in foot 4/13/16 so just getting better & had to hold off on further opportunities but am getting much better.	6/29/2016 2:06 PM
20	None of the above	6/29/2016 1:52 PM
21	None	6/29/2016 1:07 PM
22	None of the above	6/29/2016 12:45 PM
23	Occasional Luncheon Attendance	6/29/2016 12:28 PM
24	Generously offered several positions of service, even before I joined, but declined.	6/29/2016 12:11 PM
25	I am not an active member	6/29/2016 11:56 AM
26	I was involved with URVC & hope to be able to recommence.	6/29/2016 11:46 AM
27	I think we need more member participation.	6/29/2016 11:16 AM
28	I was a Secretary for 3 yrs, and as such a Board Member	6/29/2016 11:09 AM
29	I come when I can to the monthly lunch talks -- I am still involved with grad students and my own work.	6/29/2016 10:31 AM
30	live in Oregon	6/29/2016 10:07 AM
31	Limited involvement will photo club	6/29/2016 10:04 AM
32	Health problems have kept me from participating	6/29/2016 9:50 AM
33	None of the above	6/29/2016 9:32 AM
34	have not been ative for 10 years	6/29/2016 8:34 AM
35	attend monthly membership meetings	6/29/2016 8:19 AM
36	Presenter-3 occasions	6/29/2016 8:01 AM
37	Both past	6/29/2016 7:57 AM
38	none so far	6/29/2016 7:51 AM
39	also BAC representative (past)	6/29/2016 7:34 AM
40	I'm just becoming familiar with UMRA	6/29/2016 7:32 AM
41	Will be representing UMRA on a University committee	6/29/2016 7:18 AM
42	workshop presenter	6/29/2016 7:17 AM
43	Member	6/29/2016 6:41 AM
44	none	6/28/2016 11:49 PM
45	I was president	6/28/2016 11:34 PM
46	Not physically able to participate.	6/28/2016 10:46 PM
47	Member only	6/28/2016 10:34 PM
48	Program presentor	6/28/2016 10:21 PM
49	Come to most lunches	6/28/2016 10:08 PM
50	None of above	6/28/2016 10:04 PM
51	Webmaster with Dave Naumann	6/28/2016 9:56 PM
52	New member	6/28/2016 9:55 PM



### Q5 Which member benefits are important to you ?

Answered: 193 Skipped: 4



	Very important	Somewhat important	Not important	Total	Weighted Average
Luncheons and speakers	54.80% 97	37.29% 66	7.91% 14	177	1.53
Post-luncheon workshops	20.51% 32	54.49% 85	25.00% 39	156	2.04
Retiree professional development grants	20.00% 29	31.03% 45	48.97% 71	145	2.29
U of M parking discounts	49.13% 85	40.46% 70	10.40% 18	173	1.61
U of M event & services discounts	28.48% 45	54.43% 86	17.09% 27	158	1.89
Photo or Book club	6.90% 10	30.34% 44	62.76% 91	145	2.56
Care Guides (support in cases of death or illness)	12.50% 19	51.32% 78	36.18% 55	152	2.24

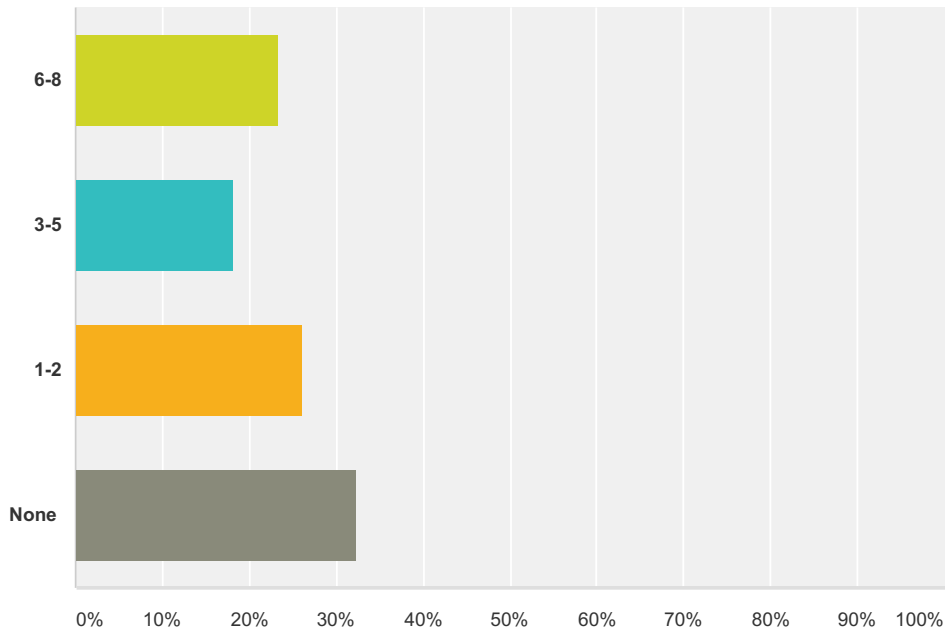
Staying informed about U of M developments/news	<b>48.02%</b> 85	<b>44.07%</b> 78	<b>7.91%</b> 14	177	1.60
Getting me back onto campus	<b>30.63%</b> 49	<b>45.63%</b> 73	<b>23.75%</b> 38	160	1.93
Camaraderie with other retirees and former colleagues	<b>54.27%</b> 89	<b>39.63%</b> 65	<b>6.10%</b> 10	164	1.52

#	Comments:	Date
1	I'll be 90 on Sept 2 and am not active at the U of M any longer	7/25/2016 12:31 PM
2	I checked the ones that would be important if I lived in the Twin Cities area	7/7/2016 11:55 AM
3	We might rate some of these benefits higher if we had been more active.	7/5/2016 2:28 PM
4	We live in Arizona part of the year.	7/4/2016 1:57 PM
5	I am hoping to get more involved I remarried on 10-3-15 and my husband died 1-14-16	7/3/2016 9:59 PM
6	Volunteer oportunities	7/3/2016 6:13 PM
7	Live out of state	7/2/2016 7:47 PM
8	I live out-of-state in Hayward, WI so it's difficult to be very involved.	7/2/2016 3:08 PM
9	My husband (also a UMN retiree) really appreciate the UMN parking discounts as he has a lengthy, monthly dr. appt. in a U specialty clinic. I also return to campus frequently to meet socially with former co-workers.	7/1/2016 10:26 AM
10	Want to keep up with "Going on"s	7/1/2016 4:29 AM
11	Though not personally involved with #3 or #6, I believe them both to be very important to UMRA as a whole.	6/30/2016 11:49 AM
12	Advice on supplemental health programs v. important	6/30/2016 9:58 AM
13	U of M Email	6/29/2016 3:51 PM
14	Important for others even if not for me.	6/29/2016 12:28 PM
15	At age 88, I am not very mobile and no longer drive.	6/29/2016 11:56 AM
16	Camaraderie by far most important	6/29/2016 11:51 AM
17	nothing for "out of towners"	6/29/2016 11:20 AM
18	probaby need more activities. Metro so spread out, tough to get attendance.	6/29/2016 11:16 AM
19	Again, health and not having a car anymore	6/29/2016 9:50 AM
20	I would like to become more involved, but I spend winters in Arizona and as a result miss almost all the luncheons.	6/29/2016 9:17 AM
21	think about lunch, but always have a confluct.	6/29/2016 8:34 AM
22	I haven't joined a photo or book club yet, but am interested.	6/29/2016 8:31 AM
23	I live some distance from campus which prevents me from being truly active in UMRA, especially since I'm no longer driving.	6/29/2016 8:19 AM
24	Why no mention of JOIE in this survey?	6/29/2016 7:34 AM
25	Information on health insurance for retirees is very useful and important.	6/29/2016 7:10 AM
26	I am still rying to figure out how to retire...	6/28/2016 10:56 PM
27	I don't mean to be so lukewarm, but I have so far had no associations at all, so "Very" could hardly be accurate but "Not" quite wrong.	6/28/2016 10:53 PM
28	I	6/28/2016 10:34 PM
29	I'm grateful for tlhe dedication of the UMRA staff.	6/28/2016 10:01 PM
30	umra provides contact with fellow retirees and opportunity to contnue post-retirement research interests.	6/28/2016 9:54 PM

**Q6 Approximately how many UMRA**

### luncheons do you attend per year?

Answered: 192 Skipped: 5



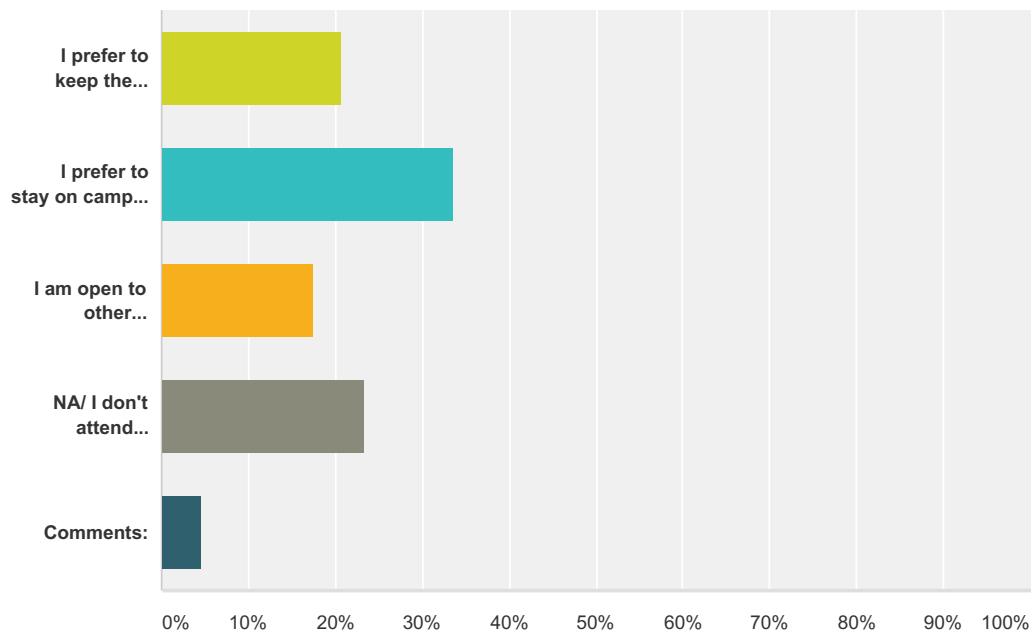
Answer Choices	Responses
6-8	23.44% 45
3-5	18.23% 35
1-2	26.04% 50
None	32.29% 62
<b>Total</b>	<b>192</b>

#	Comment:	Date
1	I live in Dallas TX in a retirement home	7/25/2016 12:43 PM
2	Would attend if I were in the Twin Cities for another reason	7/7/2016 11:55 AM
3	Not yet - I want to do so and think they are a great idea.	7/6/2016 2:23 PM
4	not as many as I would have liked	7/3/2016 9:59 PM
5	I have been working PT at the U and the luncheons are on one of my work days. I plan to attend in the future.	7/3/2016 6:13 PM
6	I hear they are always crowded and uncomfortable. So I don't go.	7/3/2016 4:45 PM
7	Live out of state	7/2/2016 7:47 PM
8	I live out-of-state, a 3-hour drive away	7/2/2016 3:08 PM
9	Unfortunately, we have had scheduling conflicts with the speakers we had been interested in attending.	7/1/2016 10:26 AM
10	Has varied. Menus have declined.	6/30/2016 9:58 AM
11	Lecturers overall are outstanding, and a pleasant way to meet others.	6/29/2016 10:40 PM
12	3-4 years regular attendance	6/29/2016 9:09 PM
13	Lack of easy access and parking limit participation -- St. Paul Campus would be more accessible for many members.	6/29/2016 7:00 PM
14	Would like to attend more but other obligations.	6/29/2016 12:11 PM

15	I did formerly enjoy occasional UMRA lunches	6/29/2016 11:56 AM
16	Out of town a lot in the woods and visiting grandkids	6/29/2016 11:51 AM
17	The pay-in-advance fee is GREAT. Res. by email would help also.	6/29/2016 11:16 AM
18	They're way too crowded these days	6/29/2016 9:50 AM
19	See previous comment. It would be helpful if there wee a luncheon in December and perhaps some in summer.	6/29/2016 9:17 AM
20	The first year we attended all of them, but last year we were U students and had a scheduling conflict.	6/29/2016 8:31 AM
21	I hope to in the future.	6/29/2016 8:26 AM
22	hasn't worked out so far	6/29/2016 8:01 AM
23	I plan on being there this year	6/29/2016 7:32 AM
24	Health related circumstances have prevented our attending.	6/29/2016 7:10 AM
25	They are so crowded I gave up attending! More space needed.	6/29/2016 6:56 AM
26	Some sound interesting but there have always been conflicts.	6/28/2016 10:56 PM
27	My partner is more sociable than I, a gregarious loner.	6/28/2016 10:53 PM
28	When in town	6/28/2016 10:31 PM
29	I commend the program commute for the quality of the speakers.	6/28/2016 10:11 PM
30	Very busy/active.	6/28/2016 10:01 PM
31	I work Tues, or I would go to more.	6/28/2016 9:56 PM
32	These luncheons keep alive professional and personal contacts.	6/28/2016 9:54 PM

**Q7 Room capacity for UMRA luncheons is a current issue. Which of the following best represents your opinion about location for monthly luncheons?**

Answered: 193 Skipped: 4



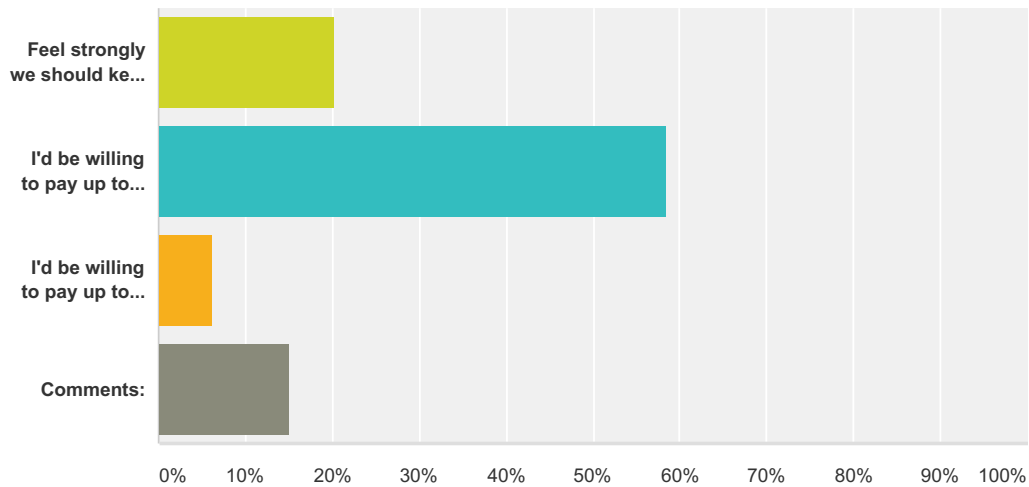
Answer Choices	Responses
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I prefer to keep the current Campus Club location despite the challenge of capacity	20.73%	40
I prefer to stay on campus but am open to other locations	33.68%	65
I am open to other locations, including off campus within the Twin Cities area	17.62%	34
NA/ I don't attend luncheons	23.32%	45
Comments:	4.66%	9
<b>Total</b>		<b>193</b>

#	Comments:	Date
1	Would be more inclined to attend lunches if held off campus	6/29/2016 3:27 PM
2	There is a Saint Paul campus	6/29/2016 1:56 PM
3	Again, accessibility without a car is important to me	6/29/2016 9:50 AM
4	umra should work on expanding activities not luncheon space	6/29/2016 9:14 AM
5	We don't have a car, so they would have to be on a bus line.	6/29/2016 8:31 AM
6	St Paul Campus? Easier access, parking, etc.	6/29/2016 8:01 AM
7	Haven't attended but might in future. Open to other locations.	6/28/2016 10:53 PM
8	If I did attend (and one day I may), any would be O.K. with me (and Janice, too).	6/28/2016 10:53 PM
9	an old perennial: bread on the tables	6/28/2016 9:54 PM

**Q8 Current cost of luncheons is \$16.  
Changing venues could mean higher costs.  
What would you be willing to pay to attend luncheons?**

Answered: 173 Skipped: 24



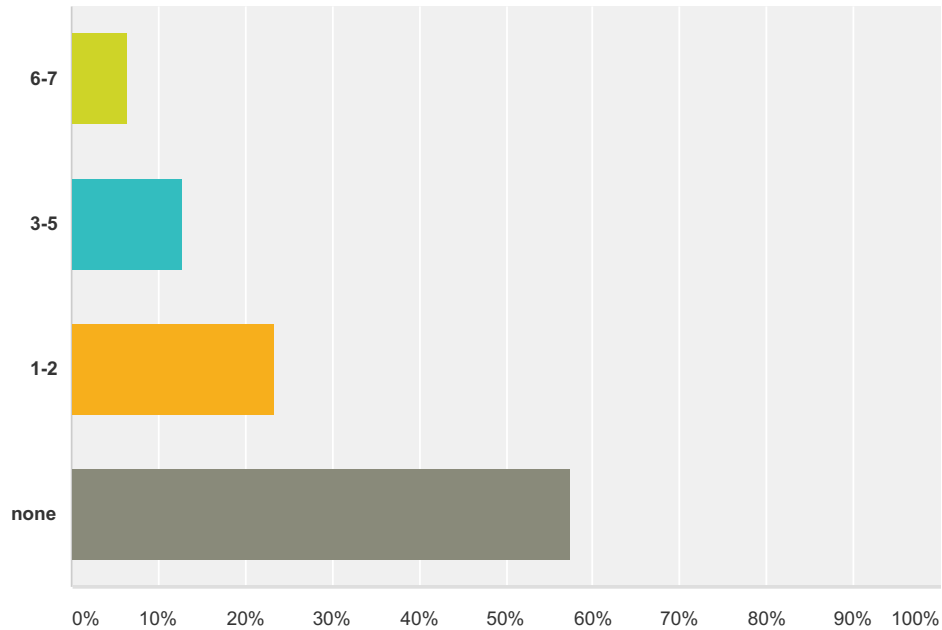
Answer Choices	Responses
Feel strongly we should keep at current cost	20.23% 35
I'd be willing to pay up to \$16-25/per luncheon	58.38% 101
I'd be willing to pay up to \$26-35/ per luncheon	6.36% 11

Comments:	15.03%	26
<b>Total</b>		<b>173</b>

#	Comments:	Date
1	It's not so much the cost but the value. We have been disappointed with the quality and quantity of food the few times we have attended.	7/5/2016 2:28 PM
2	hope the cost, if more, would keep many persons away	7/3/2016 9:59 PM
3	Live out of state	7/2/2016 7:47 PM
4	Cost is not a factor for me, but I believe it is for UMRA members	6/30/2016 3:09 PM
5	The Campus Club food for our lunches is only "fair" considering the cost.	6/30/2016 10:15 AM
6	Compared with what I have seen of what other clubs/organizations manage, I don't think UMRA gets good value for its \$16.	6/30/2016 9:58 AM
7	no opinion	6/29/2016 6:11 PM
8	Depending on the program	6/29/2016 3:51 PM
9	I don't attend luncheons	6/29/2016 3:25 PM
10	Not interested	6/29/2016 1:07 PM
11	menu options too limited for the price	6/29/2016 12:28 PM
12	Cost would not matter if I were able to attend	6/29/2016 11:56 AM
13	and will draw new members who can't get to the U	6/29/2016 11:52 AM
14	If we moved to another campus location and the parking were easier, I'd pay more	6/29/2016 11:09 AM
15	\$16 is OVERPRICED for the Campus Club quality. How can you suggest increasing the cost?	6/29/2016 10:47 AM
16	NA	6/29/2016 9:32 AM
17	The amount is not unreasonable, but what one gets for \$16 is rather meager. I'd be willing to pay a little more if a salad or small dessert were included.	6/29/2016 9:17 AM
18	Univ. Commons Hotel would be best place but probably too expensive	6/29/2016 9:14 AM
19	current lunch too costly why not simpler and cheaper	6/29/2016 9:06 AM
20	Since we are on a fixed income, the cost is important for 2 of us.	6/29/2016 8:31 AM
21	More space, simple buffet, similar price?	6/29/2016 8:01 AM
22	no comment	6/28/2016 11:49 PM
23	I'd be OK. with any of these, but \$35 for lunch ought to be pretty good.	6/28/2016 10:53 PM
24	NA	6/28/2016 10:01 PM
25	I think they should be free!	6/28/2016 9:59 PM
26	Pay extra for bread.	6/28/2016 9:54 PM

## Q9 Approximately how many post-luncheon workshops do you typically attend yearly?

Answered: 188 Skipped: 9

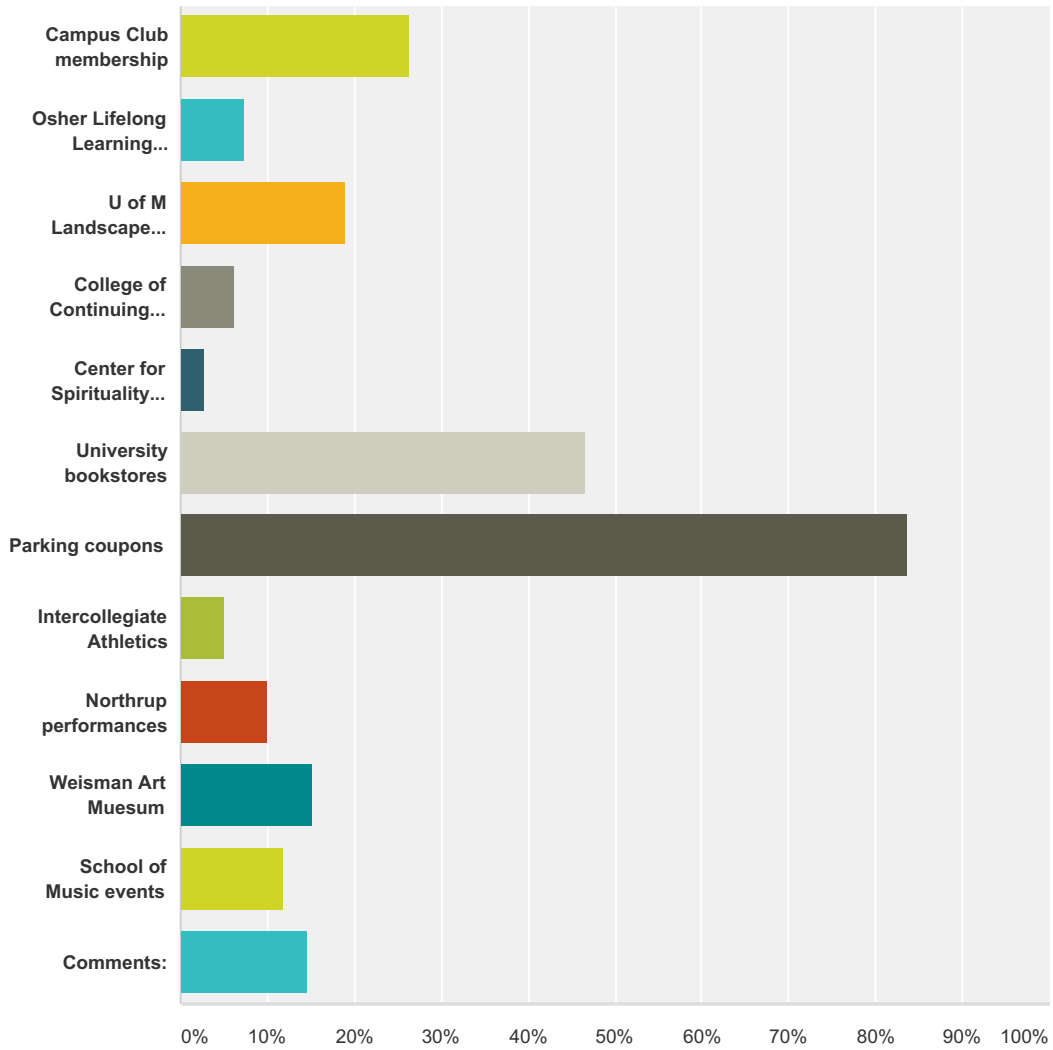


Answer Choices	Responses
6-7	6.38% 12
3-5	12.77% 24
1-2	23.40% 44
none	57.45% 108
<b>Total</b>	<b>188</b>

#	Comments:	Date
1	I don't drive much and find driving on campus and parking too difficult now	7/25/2016 12:34 PM
2	I don't attend because I do not live close to the Twin Cities	7/7/2016 11:55 AM
3	haven't been to any yet	7/3/2016 9:59 PM
4	I hear that the seating for the workshops is very limited. I would attend, but the prospect of standing for the workshop discourages me.	7/3/2016 4:45 PM
5	Live out of state	7/2/2016 7:47 PM
6	They sound interesting but I haven't felt the need so far.	6/29/2016 10:40 PM
7	--thus far!	6/29/2016 10:31 AM
8	Haven't been coming lately	6/29/2016 9:50 AM
9	Again, the first year all of them, this year I made it to one.	6/29/2016 8:31 AM
10	Good program; but takes more time.	6/29/2016 8:01 AM
11	Haven't found the topics interesting to me	6/29/2016 6:45 AM
12	I really appreciate the topics and the work that goes into them.	6/28/2016 10:11 PM
13	I work Tues	6/28/2016 9:56 PM

**Q10 Which of these UMRA discounts have you used?**

Answered: 178 Skipped: 19



Answer Choices	Responses
Campus Club membership	26.40% 47
Osher Lifelong Learning Institute (OLLI)	7.30% 13
U of M Landscape Arborteum	19.10% 34
College of Continuing Education lifelong learning courses	6.18% 11
Center for Spirituality and Healing	2.81% 5
University bookstores	46.63% 83
Parking coupons	83.71% 149
Intercollegiate Athletics	5.06% 9
Northrup performances	10.11% 18
Weisman Art Muesum	15.17% 27
School of Music events	11.80% 21
Comments:	14.61% 26

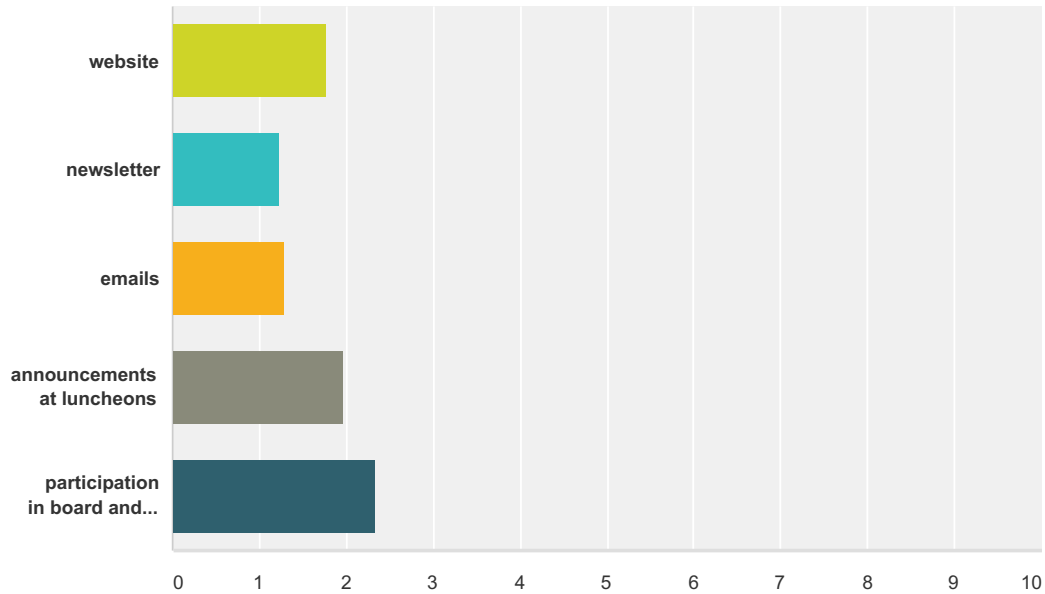


Total Respondents: 178

#	Comments:	Date
1	transportation is a major problem for me	7/25/2016 12:27 PM
2	I didn't know about half of these	7/3/2016 4:45 PM
3	Live out of state	7/2/2016 7:47 PM
4	Will use more after reading the list.	6/30/2016 2:02 PM
5	Many attendances on own, without UMRA	6/30/2016 9:52 AM
6	I'm not sure I knew about OLLI discounts...	6/29/2016 10:40 PM
7	None yet, mostly I forget, also I like to support them	6/29/2016 2:15 PM
8	I live very far away from the Mpls. St. Paul campus. If I lived closer, I would attend more events.	6/29/2016 1:52 PM
9	None	6/29/2016 1:07 PM
10	CC membership not worth the price for my limited use	6/29/2016 12:28 PM
11	I didn't know about several of the available discounts	6/29/2016 11:25 AM
12	Great benefit of membership	6/29/2016 11:16 AM
13	"Northrop" is spelled with an "o". As U students, we also get discounts.	6/29/2016 8:31 AM
14	I didn't know such discounts were available to UMRA members	6/29/2016 8:19 AM
15	As a UofM alumnus, I don't really need an UMRA discount	6/29/2016 7:51 AM
16	None	6/29/2016 6:45 AM
17	none, I live in Duluth	6/29/2016 2:17 AM
18	none	6/28/2016 11:49 PM
19	I need to explore more	6/28/2016 10:56 PM
20	Didn't know about all of these discounts. Find them appealing.	6/28/2016 10:53 PM
21	If I were more familiar with opportunities, I'd probably take advantage of them more. I didn't know there was a discount for "intercollegiate athletics" and paid a young fortune for 2 BB season tix.	6/28/2016 10:53 PM
22	Interested in OLLI, but not able to pursue at this time.	6/28/2016 10:46 PM
23	Will be good if the retirees could also qualify for purchasing discounts on computers and hand held devices. These discounts are now available to the employed faculty and staff	6/28/2016 10:31 PM
24	I forget to use the discounts!	6/28/2016 10:08 PM
25	Was not aware of these discounts!	6/28/2016 10:04 PM
26	Ushering at Ted Mann and Rarig (free plays)	6/28/2016 9:56 PM

**Q11 Which of the following are important for keeping you informed about UMRA and its activities?**

Answered: 194 Skipped: 3



	very important	somewhat important	unimportant	Total	Weighted Average
website	38.55% 64	45.78% 76	15.66% 26	166	1.77
newsletter	80.75% 151	15.51% 29	3.74% 7	187	1.23
emails	73.12% 136	24.73% 46	2.15% 4	186	1.29
announcements at luncheons	27.45% 42	47.71% 73	24.84% 38	153	1.97
participation in board and/or committees	19.85% 26	25.95% 34	54.20% 71	131	2.34

#	Comments:	Date
1	As an outstate member, the Newsletter is most important for keeping me informed; the e-mails help but are of less interest	7/7/2016 11:55 AM
2	Live out of state	7/2/2016 7:47 PM
3	need communication vehicles that go to ALL members	6/29/2016 11:52 AM
4	A constant challenge. How about an electronic bulletin board for a closed facebook group.	6/29/2016 11:16 AM
5	The membership is NEVER informed of UMRA financials.	6/29/2016 10:47 AM
6	I wonder whether the number and nature of the committees is as widely advertised as it could be.	6/29/2016 9:17 AM
7	I am over 90, alert and well but less energy for participating	6/29/2016 8:50 AM
8	I just can't get too many reminders!	6/29/2016 8:31 AM
9	Communication works well.	6/29/2016 8:01 AM
10	None	6/29/2016 6:45 AM
11	Not applicable	6/29/2016 12:27 AM
12	I moved to Lake Tahoe when I retired (2000) but thought UMRA would be a great opportunity for retirees to maintain a relationship with U and their many colleagues.	6/28/2016 11:49 PM
13	I have no "commets." Have you?	6/28/2016 10:53 PM

## Q12 Other suggestions for improving UMRA?

Answered: 46 Skipped: 151

#	Responses	Date
1	I LOVE UMRA even though I can't participate in many activities.	7/25/2016 12:38 PM
2	Consider catering at the St Paul Student Center Ballroom. Not as cozy, but can handle the larger crowd.	7/10/2016 9:58 PM
3	What about a meeting in Duluth once in a while or on the coordinate campuses so those of us who have retired but live in different areas of the state would have an opportunity to meet at least the officers and hear about retirement issues?	7/7/2016 11:55 AM
4	None	7/2/2016 7:47 PM
5	I would like you to do a podcast of the meeting so that members who were unable to attend the meeting could do so on line.	7/2/2016 12:22 AM
6	I have found the overcrowding at the luncheons to be a major reason for not attending more of them.	7/1/2016 11:55 AM
7	KEEP IT SIMPLE	6/30/2016 4:32 PM
8	I think it would be more inclusive to your members if the annual dance was open to everyone. Many members are single.	6/30/2016 2:38 PM
9	Reach out more to employees as the retire. Perhaps could work through Human Resources. The Undoes a poor job of informing retirees of all their benefits and expectations, i.e, emails, library, deleting software from personal computers, etc. perhaps this could be done through UMRA's website. Thank you.	6/30/2016 2:02 PM
10	My UMWC meets at Becketwood. The price of lunches there is about the same as at the Campus Club. The food, however, is far better (both quantity and quality). But parking for a group of our size wouldn.t be adequate at Becketwood.	6/30/2016 10:15 AM
11	regular updates on committees and committee membership	6/29/2016 10:14 PM
12	Easier parking close to meeting location for older members	6/29/2016 7:00 PM
13	U of M email is important — not just because of the free and reliable service, but because it keeps me in touch with all my new and former contacts at the U. It also means I have a U of M homepage.	6/29/2016 3:51 PM
14	As a new member, I think that a larger luncheon room would make it easier to have conversations and get to know others.	6/29/2016 3:48 PM
15	Perhaps a monthly or bimonthly social hour in the Campus Club or elsewhere for a chance to mingle with fellow retirees?	6/29/2016 2:19 PM
16	Do some surveys about the realities, costs and experiences of UMRA retirement health plans	6/29/2016 2:15 PM
17	Would favor less effort directed to squeezing benefits, services, and other goodies out of the University Administration. I think the national inflation of university costs, tuition fees, and student loans is appalling. I think that retirees who enjoyed a working lifetime of well above average pay, minimal supervision, and greater job security ought to have saved enough to fund their own retirement activities.	6/29/2016 1:07 PM
18	I'm a new member this year. I've really enjoyed the luncheon speakers. I agree that meeting room is cramped and that we should find something larger. I'm not involved in any committees yet.	6/29/2016 1:07 PM
19	Move the luncheons off campus and widen the selection of speakers to include more community non-faculty members as well as faculty from other universities. Sponsor non-luncheon programs.	6/29/2016 12:28 PM
20	Keep the excellent luncheon speakers coming!	6/29/2016 12:03 PM
21	Many thanks to the people who do all the work	6/29/2016 11:51 AM
22	None at this time.	6/29/2016 11:36 AM
23	Great organization. Wish we could be more involved with the University. IMHO big mistake to pull out years ago. Doesn't seem "fixable" now. Sad. A lot of retirees could benefit from membership and can't just get around "tuit". One contact from UMRA with a non-member retiree in a lifetime to is NUTS!	6/29/2016 11:16 AM

24	Following through on past commitments for a permanent retiree venue and the Faculty Senate resolution (now 8 years down the drain) to promote retiree participation in University academic affairs (mentoring, committee membership, etc.).	6/29/2016 10:47 AM
25	Get-togethers are too big and too formal. I prefer the UM Women's Club because of its interest sections and more opportunities to get to know people.	6/29/2016 9:50 AM
26	UMRA should have a blogging and a social media presence such as Facebook.	6/29/2016 9:19 AM
27	Consider having luncheons every month or say 11 out of 12 months. Consider having late afternoon receptions in the Campus Club bar/lounge. Perhaps do more about sponsoring or co-sponsoring other events, including special lectures or seminars of interest to retirees. Do more to show how persons getting professional development grants have used and benefitted from the awards (e.g., presentations at luncheons or in a post-luncheon event).	6/29/2016 9:17 AM
28	(1) umra should participate more in AROHE and Big10 and bring back ideas to try out to increase activities and projects. (2) Also, set up scholarship funds. (3) Like newsletter editor, an A/V/Tech person should be paid to solve all podium technology problems.	6/29/2016 9:14 AM
29	simple sandwich lunch in venue where one can move about and socialize for heaven's sake; why are we tied to Campus club and its exotic menus with poor service!!	6/29/2016 9:06 AM
30	You are doing a good job with our group with diverse interests	6/29/2016 8:50 AM
31	phone call from old friends would help get me back	6/29/2016 8:34 AM
32	I would be OK if the lectures did not include lunch. Could we use the CMU Theater and \$5 to come? It might be a good recruiting tool for people about to retire well as others interested in the topic. A social hour in Campus Club or the lecture before or after would be good.	6/29/2016 8:31 AM
33	I miss driving . . . . .	6/29/2016 8:19 AM
34	A group interested in discussing serious issues (socio-cultural, philosophical, political, economic, environmental, etc.), perhaps by reading pertinent books and/or discussing appropriate topics.	6/29/2016 8:01 AM
35	As a new member, it's all about the luncheon speakers	6/29/2016 7:51 AM
36	I think the board and officers do a great job.	6/29/2016 7:34 AM
37	None	6/29/2016 6:45 AM
38	Presently live in Tx, but plan to relocate north next year and hope to attend UMRA meetings when settled.	6/29/2016 6:07 AM
39	Keep up the good work.	6/28/2016 11:49 PM
40	Keeping me at bay is an excellent expedient.	6/28/2016 10:53 PM
41	N/A	6/28/2016 10:46 PM
42	Try to widen membership on board. More diversity. Good attempt so far considering low diversity in UMRA.	6/28/2016 10:19 PM
43	I'm a pretty passive member. I'm active in other organizations and travel a lot, so am not interested in getting more involved in UMRA.	6/28/2016 10:08 PM
44	I like the way things are going now. The speakers have been very good at the luncheons. I may take advantage of expanded options in the future, beyond the luncheons.	6/28/2016 9:57 PM
45	I wonder if current employees would be interested in the URVC volunteer opportunities? It would give members a chance to engage with current employees, and promote awareness of UMRA. Plus lots of current employees may be very excited for the opportunities! Perhaps a subscribe option on a volunteerism (online) calendar would make it simple.	6/28/2016 9:56 PM
46	We might have expert panel discussions on current events with time for Q&A.	6/28/2016 9:54 PM

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# UMRA Member Survey:2016

## Findings Summary

Presented to UMRA Board & Committee Chair Retreat, August 11, 2016

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### WHO WE HEARD FROM:

- 197 Respondents; 557 surveys were distributed by mail or email
- Responders represent all categories of "yrs as member", with 63% as members 2-15 yrs
- Most learned of UMRA from Pre-retirement info or via word of mouth
- Responses came mostly from CS staff (17.2%) P &A (19.2%) and Faculty (57%)

### HOW MEMBERS PARTICIPATE & FIND VALUE :

- Involvement in committees, board, and University Retirement Volunteer Center were most often listed as involvement categories within UMA
- 32.3% don't attend luncheons, 41.7% attend 3-8 per year
- Majority do not attend workshops; 19% attend 3-7 per year
- All categories of discounts are used; 83.7% use parking coupons, 46.6% use bookstore, following in order by Campus Club (26.4%) and Landscape Arboretum (19%)
- Seen as "very important" communication: newsletter (80.7%) emails (73%) web (38.5%)
- All listed member benefits were important to responders; those with most "very important" checked were Luncheons (54.8%) and Parking Discounts (49%)
- Of those who attend luncheons, majority (54.4%) prefer to stay on campus; 20.7% prefer staying with campus club and 33.7% are open to other campus venues
- 58.4% of responders are willing to pay up to \$25 for luncheons; 20.2% feely strongly the cost should remain \$16; 6.4% would be willing to pay up to \$35.

### WHAT MEMBERS TOLD US:

- Membership is valued even when participation is limited due to distance or health
- Past and present board membership and committee service is a positive experience
- Limited parking and campus traffic are challenges to many and limit attendance
- Choice of speakers for luncheons is overall very good
- Parking discounts are used for other campus visits (medical, social, etc) as well as UMRA
- Would like more benefits that are suited to those outside Twin Cities
- JOIE was not mentioned in the survey...noted by one respondent

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- Members appreciate UMRA “staff”
  - Camaraderie and socialization are important at events and with benefits
  - Many comments about lack of satisfaction with lunch quality and value
  - Several comments about adding more luncheons and/or social hours later in day
  - Crowding and noise level of luncheon venue was mentioned a number of times
  - A number of comments that the listed discounts were unknown to responders
  - One comment asking for more communication to members on UMRA finances
  - St. Paul campus location for luncheons was mentioned a number of times
  - One suggestion to hold a meeting in other U of M campus towns
  - Request for a “podcast” of luncheon speakers for those who cannot attend
  - Suggestion to add a Facebook and/or blogging presence for UMRA
  - Improve the speaker system for the luncheons
  - Work toward greater diversity on in UMRA and on the board
  - Several commented that they liked the organization to stay informal and “low key”
- 

*To view the survey results in complete form, visit the link below. It will be online through **August 20**. To see all comments/responses, click on “comments/responses” where highlighted in blue.*

<https://www.surveymonkey.com/results/SM-T9RMYNZT/>

## **UMRA Retreat Attendees**

### **Officers:**

**President (As of Sept. 1. 2016):** Donna Peterson

**President Elect:** Chip Peterson

**Past President:** Jean Kinsey

**Treasurer:** Carl Adams

### **Other Board Members & Their Terms:**

Roger Clemence

Judy Leahy Grimes

Cherie Hamilton

John Howe

Jeanne Markell

David Naumann

Kathleen O'Brien

Jerry Rinehart

Gloria Williams

### **Other Key Positions:**

**Newsletter Editor:** Ginny Hanson

**Webmaster:** David Naumann

**Database Manager:** Virgil Larson

**ListServ Manager/Communicator:** John Anderson

### **Representatives/Committee Persons:**

Dale Swanson

Jan Hogan

Kay Thomas

Julie Medbery

### **2015-16 Board members retiring**

Joanne Eicher

Hal Miller

### **Past Presidents:**

Vern Jensen

Bob Holt

Gayle G. Yates

John Adams ?