

## **Reconnecting UMRA and URVC: Work Team Report and Proposal Overview<sup>1</sup>**

In September 2021, the relationship between UMRA and URVC resurfaced as an area of concern for both organizations. Following discussion among the respective leadership bodies, UMRA President Jan Morlock and URVC Board Chair Jerry Rinehart agreed that a team should be formally assembled to explore these issues. A cross-organization team was appointed, and President Morlock issued a Charge Statement asking the Work Team to fully explore the issues associated with the current status and the pros and cons of any potential alteration in the relationship between these two units.

Since October 2021 the Work Team pursued these questions. Among its activities are the following:

- interviews with current and past UMRA and URVC leaders
- review of archival documents related to the development of URVC and its interactions with UMRA; these documents include previous “statements of agreement” and UMRA Newsletters providing “missing history” for both organizations
- discussions of the pros and cons of bringing the two organizations closer together with the Executive Committees and Boards of both organizations

Based on its review of the pertinent issues, the Work Team has concluded that a re-affiliation of the two organizations would be a substantial benefit to both.

### **Brief History**

URVC began as a committee within UMRA focused on connecting retirees with volunteer needs in the University and the broader community. As the activity of UMRA’s “Volunteer Management Committee” increased, however, it attracted the attention of the University’s President and University Relations (U-Relations) unit. This attention developed into a willingness to provide financial support, but as a state funded institution, the University could not provide financial support to UMRA because it is another tax exempt (501c) entity. The advantages of separation were clear at that time; UMRA itself was a relatively small organization and having a group of retirees willing to take on the volunteer activity with University support was seen as a positive accomplishment. The formal separation of the two organizations occurred in 1987<sup>2</sup> when the University Retirees Volunteer Center (URVC) Bylaws were created and approved.

---

<sup>1</sup> Formal Statement of Re-Affiliation is in a separate document.

<sup>2</sup> 1987 is the year URVC Bylaws were originally signed.

In 1996 a “Statement of Agreement” between URVC and UMRA was developed to clarify and confirm areas in which the two organization would, and would not, share resources. This document outlined the agreement to share office space and office operations including a staff member to serve both organizations. It also re-asserted that funds URVC received from the U Relations area would not be used to support UMRA functions or activity.

In 2004-06, the several of above issues were revisited (it’s not clear that the participants in these discussions were aware of the 1996 agreements). A new “Statement of Agreement on working relationships”<sup>3</sup> was drafted and agreed to by the organizations’ representatives, and while covering some of the same ground as the 1996 document it also declared reciprocal representation on Boards (i.e., UMRA President-Elect to serve on URVC Board; URVC Chair to serve on UMRA Board). An undated, handwritten entry on the document, however, indicated it was never formally approved by URVC.

Most recently (2018), a discussion of UMRA/URVC relationships by respective Board members<sup>4</sup> reaffirmed the value of a positive working relationship but concluded that, due to the differing financial arrangements and legal status, the entities needed to remain separate.

Throughout these discussions of the relationship between the two organizations, the tone has remained positive and respectful—there is a clear sense that both value each other and want to be seen as “affiliated.”

### **URVC and U-Relations**

As a possible merger is explored, however, the URVC’s connection to U-Relations requires special consideration. As the part of the University that specifically focuses on the surrounding communities, U-Relations is oriented to connections beyond the campus itself. Although we have not found specific documentation regarding this, it appears URVC’s history of working with *non-University* related volunteers and service projects reflects this broader community orientation.

For this reason, any agreement or re-affiliation between the two organizations needs to be based on the understanding that URVC will continue to look both within the University and beyond it to identify service opportunities and find volunteers to fill them.

### **Today**

In previous discussions of working together, it appears participants from both organizations were looking “inward”—at their internal operations and challenges, not “outward” to the

---

<sup>3</sup> “Proposed by John Howe and David Johnson on behalf of UMRA, and Alan Kagan and Walter Johnson on behalf of URVC.” Dated January 21, 2004.

<sup>4</sup> Summary statement prepared by John Anderson. Other participants were Alan Kagan, Bill Donohue, Frank Cerra.

communities which they seek to serve. Remaining separate allowed each organization to proceed with business as usual, and given the sometimes-fragile nature of volunteer organizations, this was an understandable and, probably, welcome outcome.

Discussions with participants in UMRA and URVC, however, suggests that there are overlapping issues which should be considered:

1. Some retirees interested in volunteer activities are not aware that URVC exists,
2. Some UMRA members who are aware of URVC are disinclined to “join another organization” to participate
3. A question among retirees is “why are there two organizations for UM retirees?”

The Work Team believes connecting UMRA and URVC would reduce this confusion and present a clearer picture of opportunities available to University retirees.

In addition, there has been relatively little growth in participation in either organization. The number of UM retirees has grown over the years, as has the number of UMRA members—from 400 in 1982 to over 700 in 2022<sup>5</sup>. There is no clear evidence, however, that the percentage of retirees opting to join UMRA or to participate in URVC services has grown. Indeed, UMRA’s numbers have gone up and down during the past decade, and reaching 700 members this past year appears to have been driven by a significant increase in retirees who took advantage of the University’s “Retirement Incentive Option.”<sup>6</sup>

Participation in URVC projects has also grown, but there is increasing recognition that its growth potential has been limited by lack of volunteers both to help manage URVC operations and outreach. While historically URVC has maintained a talented cohort of committed volunteers to maintain its operations, developing additional University and community partnerships has been a significant challenge.

The Work Team believes bringing the Volunteer Center into UMRA will create broader exposure to UM retirees, thus facilitating recruitment of fresh talent to fill existing gaps, and--given the close departmental ties that newly retired faculty and staff often maintain-- creating new opportunities for projects and partnerships.

---

<sup>5</sup> In his President’s Column in a 1999 Newsletter, UMRA President William Gardner, predicted UMRA would grow to 1000 members in the coming year. It is not known if that number was reached, but data from 2008-2022 show membership fluctuating between 500-600.

<sup>6</sup> Until 2018, limited seating at monthly UMRA luncheon forums also may have dampened enthusiasm for growing its membership. It is important to note, however, that with the addition of special interest groups, a social committee and other offerings, the number of members participating in UMRA activities has undoubtedly increased in recent years. “Growth” in UMRA might be a useful topic for a future retreat

And, of course, having URVC as part of its offerings will enhance UMRA's presence and more effectively influence new and prospective retirees thinking about their post-career activities.<sup>7</sup>

It is clear that UM retirees have a broad range of interests and plans regarding their investment of time and energy:

- Some retirees want an opportunity to continue social interaction with UM colleagues.
- Some want to join fellow retirees in intellectually stimulating presentations by University and community thought leaders.
- Others want to rejuvenate themselves through engaging in volunteer activities which they haven't had time for during their work careers.

Many retirees, however, want to do some of all the above, and it makes sense that the University's primary retiree association—UMRA-- should be the vehicle to meet all these interests.

## **What we Propose**

The Work Team believes connecting UMRA and URVC reduces confusion in our key audience and presents a clearer picture of opportunities available when they join the U's community of retirees. We recommend that UMRA and URVC agree to reconnect in serving the University of Minnesota and its retiree community. The attached Statement of Re-Affiliation provides details regarding the relationship. In general, however, the agreement means URVC will:

- Be re-established as self-contained operation within UMRA
- Retain financial and administrative alignment with University Relations within the UM.
- Retain its current acronym but become a Center<sup>8</sup> within UMRA's organizational structure.

URVC's current board will become the Center's management team and provide financial and administrative oversight of its programs and activities.

UMRA will:

- Add the URVC chair to its Executive Committee and Board of Directors
- Help identify UMRA members to serve on URVC Communications and Advocacy Committee
- Help identify UMRA members to join URVC volunteers serving as Liaisons to key academic and service units

---

<sup>7</sup> Reconnecting the two organizations should also facilitate more accurate assessment of UM retiree volunteer activity, both on campus and in the broader community. This may be accomplished through a planful combination of periodic surveys and URVC database information.

<sup>8</sup> "Centers" are common across the University and function as units focused on specific elements of a larger unit's mission, goals, and aspirations.

Finally, in the broadest sense, reconnecting UMRA and URVC as collaborative partners is consistent with the tri-partite aim originally established by UMRA: to provide UM retirees with opportunities for social engagement, intellectual stimulation, and service to the University and broader community.

---

Respectfully submitted to the Board of Directors of UMRA (February 28, 2022) and Board of Directors of URVC (March 8, 2022)

**Work Team Members:**

Jerry Rinehart, Chair, URVC Board of Directors; Past President, UMRA

Will Craig, UMRA Board of Directors

Cathy Lee Gierke, UMRA Board of Directors

Eric Hockert, Past Chair, URVC Board of Directors; UMRA Board of Directors

Deanne Magnusson, URVC Vice Chair and Project Director