

Agenda
UMRA Board Meeting
March 27, 2023

1. Approval of February Board minutes—Julie S.
2. Review of monthly budget report—Kristie FG
3. Proposal: Rightsizing the UMRA newsletter—Kris M
4. Report of the Nominating Committee—Jan M.
- 5 Proposal: Rationalizing the dues communication cycle--Ron M.
6. Other dues considerations—Ron M.
7. Launch of the Silver Gopher Service Corps—Ron M.
8. Procedures for this year's election—Ron M.
9. Regents update—Cathrine W.
10. Campus Club update—Frank C.
11. Program Committee update—Eric H.

UMRA Board of Directors Meeting (Zoom)
Monday, February 27, 2023
1:00 p.m.
Draft Minutes

In attendance (virtual): Board members: Frank Cerra, Will Craig, Kristy Frost-Griep, Cherie Hamilton, Eric Hockert, Laurie Koch, Russell Luepker, Kate Maple, Ron Matross, Jan McCulloch, Jan Morlock, Jerry Rinehart, Julie Sweitzer, Cathrine Wambach, Diane Young
Visitor: Kris Mortensen

Ron Matross opened the meeting just after 1:00 p.m. Kate moved and Jan McCulloch seconded approval of the January board minutes, with a unanimous vote in favor.

Bylaws Revision: Jerry presented the changes proposed for the bylaws to ensure effective integration with URVC. There are six critical changes:

1. Article III on Membership makes URVC council members eligible for UMRA.
2. Article IV adds the URVC chair as an officer.
3. Article IV says the UMRA treasurer will receive financial reports from URVC.
4. Article V increases the total board membership to 21 to include the URVC chair.
5. Article X expands nominating committee membership to 8.
6. Article X includes URVC chair on nominating committee.

Jerry thanked those who worked on the changes, including Will Craig, Bill Donohue, Deanne Magnuson, Erick Hockert, Andy Phalen, and Cathy Lee Gierke. Frank moved approval to present the revisions to the full membership at the May meeting, Jan McCulloch seconded, and all voted in favor. Frank questioned whether the departure of the VP for U Relations would affect the URVC funding. Jerry said he already has a meeting planned with Ann Aronson and another leader.

Finances: Kristy presented the financial report, noting that winter has been quiet. UMRA received \$920 in dues in January, and an additional \$500 in February (after this report), bringing the total to approximately \$13,000, still short of the budgeted \$15,000. Jan Morlock moved to accept the report and Will seconded, with a unanimous vote in favor.

Ron reported that Lynn Anderson had asked for a contribution of \$300 to the Age-Friendly University Day. UMRA participated last year with a vendor table but was not asked to contribute. The Executive Committee expressed consensus that UMRA should contribute for the good of the initiative. Cathrine thought it was good politics, Jan McCulloch thought it was good exposure, and others nodded in support. Russell recommended having membership signup, and Kate recommended a QR code so visitors could link to the UMRA website easily. Ron agreed.

Regents Update: Cathrine reported that over the last six months she perceived several themes including undergraduate degree progress, tuition costs (including significant actions to reduce actual costs for low- and middle-income families), campus safety committee reports, and

concerns over low enrollment at the coordinate campuses (less so Duluth.) Demographers report that the number of high school graduates is going down, and there is tough competition for students. Another topic is medical education and how to pay for it. The U has been buying up land for a new hospital, but the proposed Sanford merger brought the building proposal forward earlier than anticipated, in a possible conflict with bonding for the planned renovation of Fraser for a chemistry building. Cathrine's final item was that the Joint Legislative committee reviews the candidates for Regents on Tuesday. She suggested members send emails to their legislators in support of favored candidates. Ron reported that Bill Donohue drafted a letter to membership about the Regent selection process and Ron will send it out soon.

Laurie asked if the undergrad enrollment is severe, and Cathrine said it was (except Duluth.) there are effort to market the U as a whole, but it is hard to get out information on the true costs to families (the U is competitive with state university tuition.) She noted that the U takes in more transfer students than most colleges, and there are multiple efforts to improve their graduation rates. Jan McCulloch asked if the enrollment challenges are unique to Minnesota. Cathrine said all colleges are struggling, including private colleges, except flagship research institutions. Ron said the upcoming presentation on enrollment was timely, and MN loses students to the Dakotas but doesn't get many back. Tuition reciprocity with Wisconsin remains a challenge.

Day of Service: Will reminded members we have a signed partnership agreement with the UM Alumni Association, and UMRA sent members to Alumni Association Day of Service events (the 'day' is actually a month of events.) This year UMRA is going to host one or two events of its own. Jerry presented two possibilities. First option is on April 1, when newly admitted students will be invited to campus and UMRA members could help with directions and escorting students in shifts of 2 to 3 hours. A second option is called Every Meal and involves packing backpacks for food insecure students. The date is TBD. Everyone was supportive. The final option(s) will be communicated to members by email.

Program: Eric had two categories of items to report. First, he thanked everyone involved in putting together the February 14 Jakob Tolar webinar on short notice. He also described the March new member welcome event planned for the half hour prior to the luncheon forum at Midland Hills. He will send invitations to each new member and Jan McCulloch is arranging hosts. Second, Jan Morlock is team lead for a small group (Cathy Lee, Kate, Diane, Will and Cherie) who are planning several all UMRA events. Jan reported that the Executive Committee indicated summer was most important time due to the lack of other UMRA events. The UM Arboretum, a picnic at Como or elsewhere and another boat trip are under consideration.

Eric then asked for input on whether to hold a holiday event in December. The last one was several years ago but was popular. There have been concerns about December being a busy month and avoiding religious overtones. Laurie said December is too busy, January is good except for the weather, and perhaps November could work. Will said he loves a December event and wanted students to perform. Jan McCulloch said she is not opposed to December but that it is important to present the event as not religiously based. Cherie proposed early

November or a New Year's event in early January. Kate said she was fiercely opposed to December and likes November, perhaps near Thanksgiving. Kris agreed but fears a November event would cannibalize the in-person luncheon forum. Plenty of members are around in January and the weather can be bad in November as well. Frank noted that any December event will have religious overtones. The last December holiday event was very well attended by around 125 members. Cathrine likes advertising it as a musical event, with a cocktail party ambiance. Kate wanted to avoid the "germiest" time, and Frank said the estimates of flu and COVID waves are not out yet. Jerry supported consideration of music, especially presented by students. Diane supported Kris' concern that a November event would reduce luncheon attendance.

Campus Club: Frank reported the club is working on the 501(c)3 status but has had no success negotiating with real estate over rent. Budget projections for next year, with the reduced subsidy, show a deficit roughly the same as the subsidy. Membership is up by about 200 people, however. Ron asked if there is any news on rates for next year, and Frank said he has not heard any such discussion. Jan Morlock said she heard one person question the Midland Hills location for March, but no one else had heard concerns.

Nominating Committee: Jan reported the nominating committee will present a slate of officers and four board members. She has two formal nominations so far and asked for more. There will be a nomination for John Bantle who was elected to a one-year post with the intention of a full term to follow, but the subsequent nomination did not occur. Cathrine asked for a list of members and Kris said the website as a pdf directory list from June 2022. Frank said the previous year's nomination committee intended to nominate John again when his term was up.

Email and OIT: Ron reported that after the OIT email proposal update he received a number of appreciative comments and a handful of people who asked why he hadn't advocated on behalf of all retirees. Ron said that UMRA members are especially interested in maintaining a connection with the UMN and we don't have any data on non-members use of email, etc. Kris asked if cost is a factor for OIT? Ron said cost is **the** driver. Google changed pricing which is now based on the number of people. Jerry said UMRA is not a union that negotiates rules that then apply to all. Eric noted the OIT proposal is not set in stone. Ron agreed, although he is pleased UMRA members' continued eligibility is written into the proposal now. Laurie asked if continued Gmail accounts could be a recruiting tool. Ron said perhaps but not until it is set in stone. Eric thinks it should be a recruiting tool, along with discounted parking rates, but all agreed we wait until it is formally decided.

Ron **adjourned** the meeting at approximately 2:26 p.m.

University of Minnesota Retirees Association

Financial Report

February 2023

Fiscal year July 1 through June 30

UMRA		
	6.30.22	2.28.23
Savings Certificate	\$ 10,243	\$ 10,254
Savings Account	\$ 6,973	\$ 6,974
Checking Account	\$ 3,402	\$ 6,246
Total Checking and Savings	\$ 20,618	\$ 23,474

URVC	
Carryforward	\$ 5,130
Total Available 2/28/23	\$ 6,384

	UMRA		
	Budget FY23	February	YTD
Revenue:			
Sponsorships	\$ 6,500		\$ 3,000
Summer Social	\$ 2,000		\$ 1,950
Annual Dues	\$ 15,000	\$ 560	\$ 12,970
Luncheons/Events	\$ 14,400		\$ 8,345
Future Luncheons			\$ 1,710
Donations			\$ -
Transfer out of Savings	\$ 2,600		
Total Revenue	\$ 40,500	\$ 560	\$ 27,975
Expenses:			
Cares Committee (memorials and expenses)	\$ 900		\$ 630
Newsletter printing/ mailing	\$ 3,820	\$ 547	\$ 2,240
Newsletter personnel contracts	\$ 8,000	\$ 450	\$ 4,100
Membership committee costs	\$ 600		\$ -
Other Annual Meeting costs	\$ 1,060		\$ 1,060
Luncheons/Events	\$ 17,700		\$ 10,194
Host Committee	\$ 460		\$ 122
Square / Stripe fees		\$ 22	\$ 735
Summer Social	\$ 2,000		\$ 1,813
Big 10 Conference costs	\$ 3,700		\$ 2,126
Insurance	\$ 1,500	\$ 855	\$ 1,434
AROHE	\$ 220		\$ 120
Other	\$ 540		\$ 557
Total Expense	\$ 40,500	\$ 1,874	\$ 25,131
Net Income (Loss)	\$ -	\$ (1,314)	\$ 2,844

	February	YTD
Revenue:		
Allocation		\$ 4,000
Total Revenue	\$ -	\$ 4,000
Expenses:		
Student workers	\$ 407	\$ 2,374
Parking	\$ 14	\$ 245
Crash Plan License		\$ 57
Food		\$ 70
Other	\$ -	
Total Expense	\$ 421	\$ 2,746
Net Income (Loss)	\$ (421)	\$ 1,254

Notes:

Other annual mtg cost for Joel Westacott due to late invoicing

Sponsorships receivable \$1,750

Net event expense YTD = (\$2,525), approx 67% of budget...approx 63% of events have occurred

February =

0.666667 % of year

spending YTD =

0.6865 %

Rightsizing the UMRA newsletter

Kris Mortensen, UMRA news editor

March 17, 2023

Proposal

To change the frequency of the publication of the UMRA newsletter from monthly (8x/year) to quarterly (4x/year), and to change the distribution of the print newsletter to reach all UMRA members instead of just some, currently about half the membership. Production and distribution of the monthly *UMRA eNews* would remain the same (8x/year).

Goals

1. To make optimum use of the resources required, both human and financial, for the production and distribution of the newsletter, and
2. to better serve the association's current communication needs and opportunities.

A brief history of the UMRA newsletter

UMRA was incorporated in **1978** and started a newsletter soon after, recognizing the importance of communication to building and sustaining the organization. The first editor was appointed in **1981**. Ginny Hanson was retained as the newsletter editor in **2004** and continued in that role for nearly 15 years! In **2012**, UMRA Treasurer Earl Nolting started soliciting sponsor support for the newsletter. In **2017**, UMRA hired a production editor to create the layout and coordinate the printing and mailing of the print newsletter (work Ginny had done previously, in addition to her role as editor); post the newsletter PDF plus individual articles on the website; and create the layout and distribute the new, monthly *UMRA eNews*, working under Ginny's editorial direction. In **2018**, Kris Mortensen succeeded Ginny as newsletter editor, and in **2019** Kris assumed responsibility (from the production editor) for posting all news and events content on the website in addition to her responsibilities as news editor. Also in **2019**, Bev Moe was recruited to become sponsorship manager, and The Pillars of Prospect Park became the first to sponsor an UMRA forum.

The primary purpose of the newsletter is to help the Retirees Association build and foster community by showing who we are, telling what we do, and inviting people to participate.

Until March **2020**, when COVID-19 forced UMRA to cancel its monthly in-person luncheon forum and workshop (both traditionally held on the fourth Tuesday of the month, along with the UMRA Board meeting), the monthly newsletter and *UMRA eNews* seemed well-suited to meet the association's needs for regular communication with members, along with the UMRA website, UMRA-MEMBERS Listserv, and UMRA Facebook group.

Current situation

Times have changed. UMRA is no longer an organization that revolves around a once-a-month gathering at the Campus Club. The good news is, UMRA has succeeded in maintaining interest in its high-quality monthly forums and workshops, and UMRA's interest groups are flourishing. But a monthly newsletter is no longer nimble enough to serve some of the organization's more time-sensitive communication needs.

As seen in the table below, the UMRA news team—in addition to producing two versions of the monthly newsletter, one printed in black and white and one posted in color (as a PDF) on the UMRA website—is responsible for producing the monthly *UMRA eNews* and for posting news and events articles (from the newsletter) on the website.

Current news communication schedule (2022–23)

	2022.09	2022.10	2022.11	2023.01	2023.02	2023.03	2023.04	2023.05
8-page, print	✓	✓	✓	✓	✓	✓	✓	✓
8-page, PDF	✓	✓	✓	✓	✓	✓	✓	✓
UMRA eNews	✓	✓	✓	✓	✓	✓	✓	✓
Web content	✓	✓	✓	✓	✓	✓	✓	✓

- 8-page print newsletter is mailed 8x/year via USPS to c. 300 UMRA member households and via Campus Mail to 32 VIPs.
- 8-page PDF newsletter is posted 8x/year on the UMRA website.
- *UMRA eNews* is emailed 8x/year via the UMRA-MEMBERS Listserv to c. 750 unique UMRA member email addresses.
 - There are 8 UMRA members without email addresses (as of February 2023).
- The UMRA news editor is responsible for posting news and events articles on the website, monthly and as needed.

Proposed change (effective 2023–24)

To achieve the goals of optimizing resources and better serving UMRA’s current communication needs, I am proposing to make the following change:

	2023.09	2023.10	2023.11	2024.01	2024.02	2024.03	2024.04	2024.05
12-page, print	Fall		Winter			Spring		May
12-page, PDF	Fall		Winter			Spring		May
UMRA eNews	✓	✓	✓	✓	✓	✓	✓	✓
Web content	✓	✓	✓	✓	✓	✓	✓	✓

Distribution schedule for the print/PDF: **Fall** (delivered late August); **Winter** (late October), **Spring** (late February; coincides with UMRA’s return to in-person forums in March), **May** (late April; includes slate of officers and directors to be elected at UMRA’s annual meeting).

- 12-page print newsletter is mailed 4x/year to all UMRA member households (c. 600) and 32 VIPs
 - USPS mailing list is de-duped to avoid sending duplicate copies to the same HH.
- 12-page PDF newsletter is posted 4x/year on the UMRA website
- Production and distribution of the *UMRA eNews* remain the same (8x/year)
- UMRA news editor continues to post news and events articles on the website

Cost

	Current	Proposed
Preprinted newsletter shells	$300 \times 8 = 2,400 \times .33 = \792	$600 \times 4 = 2,400 \times .33 = \792
Printing	$\$379 \times 8 = \$3,032$	$\$400 \times 4 = \$1,600$
Mailing (labor and postage)	$\$170 \times 8 = \$1,360$	$\$242 \times 4 = \968
Production editor	$\$450 \times 8 = \$3,600$	$\$550 \times 4 = \$2,200$
		$\$300 \times 4 = \$1,200$
News editor	$\$450 \times 8 = \$3,600$	$\$550 \times 4 = \$2,200$
		$\$400 \times 4 = \$1,600$
TOTAL	\$12,384	\$10,920

Benefits

1. Fewer and less burdensome deadlines for the UMRA news team and primary newsletter contributors, in particular the president and president-elect/Program Committee chair
2. Doubling the circulation of the print newsletter
3. Reducing the time and labor required to maintain the USPS mailing list for the print newsletter
4. Lowering the cost of production and distribution (both total and per newsletter)
5. Creating an opportunity to shift the focus of the newsletter to a more magazine-type publication, aligned with the changing seasons

Sponsorship

1. Rates to remain unchanged for 2023–24
2. Effort will be focused on retaining current sponsorship for newsletters and forums (\$7,500 for 2022–23) and adding sponsors for workshops.
3. Maximum total pages available for sponsor ads per newsletter will be increased from 1 page (for 8-page newsletter) to 1.5 pages (for 12-page newsletter)

Why increase distribution of the print newsletter to all UMRA members?

President Ron Matross reported during the February meeting of the Communication and Outreach Committee that UMRA membership renewals have been declining since 2018–19. We're not sure why. But this could be reason enough to expand the distribution of the new, quarterly newsletter to reach *all* UMRA member households. UMRA's print newsletter is a tangible reminder of belonging to a community of like-minded people.

Currently, the print newsletter is mailed to a list of about 300 member households that includes

- members who request the print newsletter
- members who joined before 2010 and expressed no preference
- new members (a slippery number, depending on how long someone is considered "new")

Print vs. digital

I was new to UMRA when the decision to launch the monthly *UMRA eNews* was made in 2017. I think the intention at the time, among some members, was to eventually eliminate the print/PDF newsletter. And I, myself, flirted with that idea in an early “rightsizing” proposal I presented to the Communication & Outreach Committee in October 2022.

There are pros and cons to both print and digital. Here, from two recent surveys of higher education communication professionals conducted by Capstone Communications, are five reasons why “print still matters”:

1. People notice what’s in print.
2. People actually read what’s in print.
3. People retain what they read on paper longer than what they read online.
4. People value physical objects more than digital ones.
5. Print still has an appeal that cannot be replicated digitally.

According to the U.S. Postal Service, the typical person now receives about a thousand pieces of mail per year, which is a little more than three pieces of mail per delivery day. Compare that to the 100+ emails the average person receives per day, every day.

Furthermore, one upshot of COVID-19 has been a resurgence in appreciation for traditional ways of doing some things, including meeting In Real Life and communicating in print.

Personally, I think “both/and,” as proposed here, is the best answer to the print vs. digital question.

Conclusion

I have given this opportunity for change a lot of thought since Ron Matross and I first met to discuss it on September 1, 2022. The UMRA newsletter has a long and admirable history, almost as long as the association, itself, and transitioning from a monthly to a quarterly publication is a big change. I initially saw it as a need; our resources have been stretched thin for some time. But now I see it as an opportunity—to reach all our members, with a publication that nicely aligns with the seasons and at a lower cost than what it currently costs to reach half our members! To ensure the continuity of year-long communication with the membership, especially as it relates to time-sensitive events, the UMRA news team will continue to produce the *UMRA eNews* and post news content on the UMRA website on a monthly basis. I see this rightsizing of our resources and ambitions as a win-win-win, and I hope you will, too.

The UMRA news team

News editor – Kris Mortensen

Production editor – Sadie Brendalen

Contributing editors – Kris Bettin, Julie Medbery, Becky Yust

Editor emerita – Ginny Hanson

Communication & Outreach Committee Chair – Jean Kinsey

U of M Printing Services
U of M Addressing & Mailing

UMRA sponsors, 2022–23

The Bakken Center for Spirituality & Healing
The Pillars of Prospect Park
University Bookstores
University of Minnesota Foundation

Bev Moe, UMRA sponsorship manager

March 24, 2023

TO: UMRA Board Members

FROM: Jan Morlock, Nominating Committee Chair

RE: Final Report of the Nominating Committee for 2023

I'm pleased to report that the Nominating Committee is recommending a slate of candidates for your consideration for UMRA leadership positions. We request action on this slate at the board meeting on March 27 in time to communicate with members and prepare for election at the May annual meeting. Subject to your approval of the slate, the candidates are:

Position	Candidate	Term
President-Elect	Julie Sweitzer	2023 - 2024. Julie served one term as Board Secretary, 2022 - 2023
Treasurer	Kristy Frost-Griep	2022 - 2023; 2023 - 2024
Secretary	Laurie Koch	2023 - 2024; Laurie was originally elected to a board term 2021 - 2024
Board member	John Bantle	2022 - 2025 (retroactive to July 1, 2022 to serve balance of Ron Matross' original term)
	Jan McCulloch	2020 - 2023; 2023 - 2026
	Barbara Shiels	2020 - 2023; 2023 - 2026
	Brad Clary	2023 - 2026
	Diane Gihl	2023 - 2026
	Mike Hancher	2023 - 2026
	Wendy Pradt Lougee	2023 - 2024 (to serve balance of Laurie Koch's term)

Each of the candidates has agreed to serve if elected. If this slate is approved and the candidates elected by the membership, a scenario of the composition of the board starting July 1, 2023 accompanies this report for your reference. Since nominations may be made at the

time of the election, the board composition may differ from this scenario, but we thought it would be helpful to show you the presumed roster if this recommended slate is elected. I would be happy to discuss further the committee's process and the qualifications of these candidates at the board meeting on Monday, March 27 as needed.

Consistent with the current by-laws and the by-laws as they will be amended in May, the Nominating Committee included three UMRA members not presently on the board; two current UMRA board members; UMRA's President-Elect, and the current President of the URVC Council. Please join me in thanking the committee members for their work: Dale Blyth, Cathy Godlewski, Eric Hockert, Russell Luepker, Jerry Rinehart, Becky Yust, and Cathrine Wambach.

Nominations were solicited. We invited all UMRA members, via articles in the January UMRA Brief and again in the March newsletter, to suggest names for consideration. UMRA board members were invited to submit names. The suggestions that were received were carefully considered and helped with our work to develop the slate. Through these suggestions and those from committee members, we have a list of members who are not on this year's recommended slate but may be excellent candidates for consideration in the future. We'll pass along this list to Ron Matross for consideration by next year's committee.

Thank you for considering our recommended slate.

UMRA Board of Directors scenario with recommended slate as of March 24, 2023, for year beginning July 1, 2023

Highlighted names are presumed nominees for election or re-election this year.

	Name	Term(s)	Notes
President	Eric Hockert	2023 - 2024	Served as Pres-Elect 2022 - 2023; served as a board member 2019 - 2022
President-Elect	Julie Sweitzer	2023 - 2024	Elected to Sec'y position and served 2022 - 2023; did not previously serve on the board.
Secretary	Laurie Koch	2023 - 2024	Originally elected to board term 2021 - 2024
Treasurer	Kristy Frost-Griep	2023 - 2024	Elected to Treas position and served 2022 - 2023; did not previously serve on the board.
Past-President	Ron Matross		Served as President 2022 - 2023. Served as a board member 2019 - 2022
Past-President	Jan Morlock		Served as President 2021 - 2022. Elected to board for term 2019 - 2022
Past-President	Frank Cerra		Served as President 2020 - 2021.
URVC Council President	Jerry Rinehart, or newly-elected URVC Council President	2023 - 2024	With by-law amendments to be enacted May, 2023, the URVC Council President serves on the Executive Committee of UMRA

Members			
	John Bantle	2022 - 2025	Elected in 2021 to one-year remainder of Ron Matross' term on the board; nominated for re-election retroactive to July 1, 2022
	Brad Clary	2023 - 2026	Nominated for first term
	Will Craig	2019 - 2022; 2022 - 2025	
	Diane Gihl	2023 - 2026	Nominated for first term
	Mike Hancher	2023 - 2026	Nominated for first term
	Wendy Lougee	2023 - 2024	Nominated for first term; will serve remainder of Laurie Koch's term, with option for nomination for up to two more 3-year terms.
	Russell Luepker	2022 - 2025	
	Kate Maple	2022 - 2025	
	Jan McCulloch	2020 - 2023; 2023 - 2026	Served 2020 - 2023 term; nominated for re-election
	Barbara Shiels	2020 - 2023; 2023 - 2026	Served 2020 - 2023 term; nominated for re-election

Proposal to Rationalize the UMRA Membership Renewal Cycle

Ron Matross

3/20/23

This is a proposal to alter the communications cycle regarding UMRA membership renewal, with the goals of:

- improving the renewal rate
- accelerating renewals to give us an earlier idea of our dues revenues.

Current Communications Cycle

Currently the membership year begins on September 1st. Communications regarding renewals begin in late June or early July with an email renewal notice to members. Another email goes out in August. From October to March, additional email or mailed notices go out, depending on the flow of renewals. The communications cycle essentially lasts from July to March. The communications are administrative in tone.

The problems with the current cycle are:

- This cycle complicates budgeting because significant numbers of renewals are not received until late fall or winter.
- The initial notices go out at a time when there are no UMRA events or communications, and the renewal message is not included in other UMRA communications. Summer is also a time when many travel.

Proposed Communications Cycle

The dues communications cycle would be synchronized with our newsletters, events and budget cycle:

- Start the membership year on July 1st to match the start of our fiscal year
- Begin a membership drive in early May with an article in the newsletter and mention at the May annual meeting, May workshop, and Special Interest Group meetings
- Send an all member email solicitation in early to mid-May. In addition to instructions for renewal, it would highlight the UMRA value proposition. If possible, separate letters would go out to those new members who are finishing their initial year, and those who have renewed before.
- Send an email reminder to non-renewals in early to-mid June.
- Include reminders in the September newsletter and at meetings
- Send another email reminder to non-renewals in early September
- Send a mailed solicitation to remaining non-renewals in early October. Include return envelope.

I propose starting the new cycle in May 2023 (April 2023 for the newsletter deadline). I have checked with Virgil Larson and Cathy Lee Gierke, and they have tentatively said it is feasible to start this year.

Dues Structure Questions

Ron Matross

3/20/23

It would be good for the Membership Committee and the Board to have a comprehensive review of our dues structure, which has been in place for several years. There isn't time to do this review this year, but it is possible to consider two changes have been discussed by several UMRA groups in the last few months.

- **Couples membership rate.** The Membership Committee has recommended that the \$40 couples membership rate be eliminated, so that couples would pay for two \$30 memberships. This would be more equitable for single members.

Taking the rate away would likely result in some pushback from those who have had it. An alternative would be to not eliminate it this year, but to raise the couples rate to \$50. Doing so would make the rates fairer for singles, and the separate rate could be eliminated the following year if desired as part of overall revision of the dues structure.

- **Free initial membership.** The argument for the free initial rate is that it increases our new membership numbers, and gives us a chance to show new members what we do. The argument against it is that it reduces renewal rates because there is no initial monetary commitment.

We don't have much data to help answer these questions, only differing opinions. We have had substantial sign-ups of new members in the last couple of years, but these increases may be driven by the University's retirement incentives.

My inclination is not to change the free membership this year. We need to use this year to gather good baseline data on sign-ups and renewals, so that any future changes can be assessed. And most importantly, we can test the effects of increased outreach to new members. We should continue to expand our efforts to reach out to new members to involve them in our activities. We can test whether these efforts result in a higher renewal rate

In another year, we will know whether the OIT proposal to eliminate retiree email access has gone through. If it does, then retirees would have a powerful incentive for joining UMRA and the free year would likely not be needed.