

Big Ten Retirees Association Conference (BTRA)

July 2023

Annual Report

Eric Hockert (President) and Ron Matross (Past President)

Executive Summary:

This conference included discussions of best practices and the development of a table comparing each school's retiree association across several useful metrics.

Recommendations:

1. UMRA should continue to participate in the BTRA conferences with representation by the then current UMRA President and the UMRA President-elect.
2. We should identify a lead person for the 2026 BTRA conference to be hosted by UMRA. This organizing work should begin no later than January 2024 according to BTRA recommendations based on their planning documents.
3. We should maintain regular contact with the Provost to assure both administrative and financial support for the 2026 BTRA conference.

Report:

Both the weather and the collegial discussions were warm at the 2023 Big Ten Retirees Association conference held at the University of Wisconsin–Madison in late July. Current and past UMRA presidents Eric Hockert and Ron Matross represented UMRA and enjoyed exchanging ideas and practices with representatives from the other Big Ten associations.

The conference attendees discussed several issues. One that was of interest to all was the issue of how to help current members become more deeply involved in their associations so that leadership revolves.

8/29/23

Eric Hockert (UMRA President)

We also spent time sharing information about our programs. See the related spreadsheet (Big Ten Comparison 2023 230829). Of particular interest to our sister schools were UMRA's Cabinet of Curiosities series and the Silver Gophers Service Corps. Both discussions gave us several ideas worth pursuing. There was also an interest in AROHE (Association of Retiree Organizations in Higher Education – AROHE.org). Eric (AROHE Board member) provided a brief overview for the group and plans to follow-up with those who are not yet AROHE members.

The conference was also a chance for the UW–Madison Retirement Association to showcase its campus and faculty. We heard excellent presentations about land-grant universities, sustainability at UW–Madison, and how higher education can serve the underserved. These were a fine complement to our roundtable discussions.

A recent conversation with Provost Croson included the concepts for administrative and financial support of the 2026 BTRA conference to be hosted by us.

Next year's (2024) conference will be at Ohio State University (Columbus) and at Michigan (Ann Arbor) in 2025. Minnesota will host the 2026 conference in Minneapolis when there will be 18 schools in the Big Ten with the addition of UCLA, USC, Oregon, and Washington.

ACTIVITY	ILLINOIS	INDIANA	IOWA	MARYLAND	MICH	MSU
Year began	1971	1975	1995		1953	1949
Number of retirees/emeriti <u>eligible</u> to join your association			715 (Association members)		10,000	4,700
Membership growing/declining	1,850 D	420	G		2,079 G	G
Members living locally			579		5,000	605
Percentage of members attending events (virtual/in-person)						
What are your dues?	\$41/yr	\$25 1yr; \$30/couple	1 yr free, \$10/yr or \$25/3 yrs, (incl spouse, partner)		\$15/yr	none
What is your fiscal year?						
Newsletters/yr	2	8	10		3	7
Number programs/ events offered annually open to all members						
Do you offer programs during summer months?						
Do you offer evening programs? Do you offer programs on weekends?						
Do you hold general-membership meeting(s) at which you conduct business (e.g., officer election, bylaw amendments, etc)? Yes / No -- How often? How many?						
Do you have special Interest groups (over and above committees) (book clubs, photography, walking, etc)	none		2		n/a	15
Joint programs with OLLI	no		no		no	no

Do you have a formal relationship with Alumni Association	no		no		exploring	no
Do you have a formal relationship (MOU) with your Institution						
Dedicated space	Small Campus office	Meeting space	no		Small office & mtg. room access	yes
Primary liaison with home University (NB: different than "formal relations with Alumni Association" [above])			None		Human Resources for Presidents's Office	
Access to Univ. licensed software (Yes/No)			N		N	
Free (F) or Purchased (P)			-		Access to data	
Approximate annual operating budget			\$7,000		ca. \$40,000	
Source(s) of funds (e.g., dues, Univ. sources, outside sources?)					Dues, contributions, sponsorships, small grants from the University	

Rutgers not included, no info

MINN	NEB	NU	OSU	PSU	PURDUE	WISC
1976	1961	2001	1983	1947	1976	1999
		~650	>20,000	>6,000	>5,000	
800	662	650	>2,700	1,187		2100
G		G slowly	slight D	G slowly	G	G slowly
527	466	~350	>12,000		65%	62.70%
12% for each event						20-25%
\$30 single, \$40 couple	1 yr free, then \$25/yr	none	\$25/yr w/spouse, \$500 life	1yr free; \$15/3 yrs (incl spouse, partner)	none	\$30/yr; \$150/6 yr; \$400/life (incl. spouse/partner)
July 1-June 30						July1-June 30
8	2	4	12	4	10	10
19						All. Offer 30-45events per year
Yes						day travel trips
No						not currently
Yes - Annually in May						Yes, one annual mtg (May)
Yes - 7	OLLI	3 (developing more)	8+10 comm.	n/a	yes	no, but there is some interest
no	2/term	no	no	no	no	no

Yes	yes	no	w/in alumni assn.	no	no	developing
Yes						in the works
Yes - shared office	Room access	Small office & mtg. room. Access to larger rooms	file, cust. Serv. Staff	no	no	small cubicle
Provost		Provost's Office	Alumni association	Human Resources	Human Resources	none
No	Y	Y		No	No	No (Institution license no longer allows)
	P	P			-	n/a
\$40,000	ca. \$17,000	ca. \$20,000 plus salary for a 15 hr part time person		ca. \$8,000	\$17,000	\$45,000
Dues Sponsorships	Dues & Interest from Funds at NU Foundation	Provost		Dues	University	Dues, event fees, interest