

# 2018 Big 10 Retirees Association Conference

## submitted by Earl Hawkey and Jeff Keown

In regards to the meeting only 12 of the 14 Big 10 schools were in attendance. Based on the conversation that took place it looks like Maryland and Rutgers do not have active or clearly defined retiree organizations. The major outlier in the 12 that did attend was Northwestern which appears to be a retired faculty based organization only. While officially it is described as an Emeriti Association the people from Northwestern indicated that almost all retired faculty are given the “Emeriti” title unless that have totally alienated the rest of the University community.

There are a couple of institutions that actually give direct funds to their retiree organizations and/or part time support staff, but most organizations are like us - pure volunteer groups. Some do raise funds by going out to get businesses sponsors. Of course that also involves allowing these sponsors access to the membership to sell their services or promote their products. Several institutions do not charge membership fees including Indiana, Michigan State, Northwestern and Purdue.

One topic that seemed to be of great concern was that a number of institutions do not provide any information regarding new retirees to their groups. Based on the discussion it appears to be related to either a lack of interest on the part of their HR groups or a general concern regarding the privacy of employment records. My reading on this is that it may have more to do with the interpretation of state privacy laws as it relates to changes in the employment status and/or how the retirees organizations are seen by the institution – i.e. whether the retiree groups are seen as part of the university or loosely affiliated private organizations.

The full comparative information gathered before and after the meeting are included as attachment to this report although not all institutions responded to the survey.

### Presentations

The opening presentation was by Richard Alley Evan Pugh Professor of Geosciences at Penn State. It was an interesting presentation that revolved around the history of energy sources used to fuel developing and modern industrial economies and how we have changed from predominant energy sources previously when their use became unsustainable. He argued that there are other sources of renewable energy such as wind and solar that can and will eventually supplant fossil fuels. Government can help that process and thereby reduce the bad climate side effects, but the change to different energy sources is economically (if not environmentally) inevitable.

There was a presentation about what Penn State provides for retirees in terms of health care. They do offer a Medicare Advantage Plan (Part C) that they actually subsidize with state funds such that the premium is only \$80 per month per person. That would be nice to have but I think it would be a non-starter in Nebraska. There was additional discussion in regards to state sponsored defined benefit plans versus defined contribution plans similar to our situation here.

The structural problem for retirees is clearest in states like Illinois that exempted their employees from Social Security coverage but now find it difficult to finance their retirement plans. While the private sector has moved predominately to the defined contribution model, this is difficult for these states to do since their retirees often do not qualify for significant Social Security benefits.

The speaker for the evening meal was Barry Lee Myers who is the Co-Founder and CEO of AccuWeather (based in State College, PA). In his presentation Mr. Myers talked about how he and his brother founded AccuWeather and how it has completely changed how weather information is generated and consumed worldwide. He also emphasized how his company recruits talent from all of our institutions.

On the final day we had a talk from Amy Lorek who is a faculty member at Penn State. She described an experimental class that she taught where she brought together undergraduate students and retired volunteers to encourage interaction and develop better generation understanding. She thought both groups gained a lot of insight and considered it very successful. She also referenced a TED talk that she thought would be of interest and can be found on YouTube and at: [https://www.ted.com/talks/laura\\_carstensen\\_older\\_people\\_are\\_happier](https://www.ted.com/talks/laura_carstensen_older_people_are_happier)

#### Future Meetings

The 2019 meeting of the Association will be held at August 2-4, 2019 at the University of Illinois at Champaign-Urbana at the I-Hotel and Conference Center on campus.

Locations of future meetings are as follows:

2020 – University of Iowa

2021 – Indiana University

2022 – Northwestern University

2023 – University of Wisconsin

2024 – Ohio State University

Projected future meetings not official yet:

2025 – University of Michigan

2026 – University of Minnesota

2027 – Michigan State University

2028 – University of Nebraska

2029 – Purdue University

2030 – Penn State University

## Conference Agenda

# Big Ten Retirees Association Annual Conference Nittany Lion Inn, Penn State University, University Park, Pa August 3 – 5, 2018

## Agenda

### Friday, August 3

2:00 – 4:00 p.m.: Registration. Rotunda, Nittany Lion Inn [earlier indicated as Alumni Lobby]

4:00 p.m.: Keynote address – **Finding the Good News on Climate and Energy**, by **Richard Alley**, Evan Pugh Professor, Department of Geosciences

5:30 – 6:30 p.m.: Social Mixer, Alumni Lobby, Nittany Lion Inn

6:30 – 8:00 p.m.: Dinner, Alumni Lounge, Nittany Lion Inn. Welcome on behalf of the University, and after-dinner conversation with **Nicholas Jones**, Executive Vice President and Provost

### Saturday, August 4

7:00 – 8:00 a.m.: Breakfast, Penn State Room (Dining Room breakfast buffet)

8:30 – 10:00 a.m.: **Around the room.** Penn State Room  
Summary information from all Associations/Clubs. What works well in our clubs? How can we help each other to improve, expand, serve our members, attract more members, improve service to our institutions? What do we receive and what should we hope to receive from our institutions as retirees?

10:00 – 10:15 a.m.: Break, with coffee, tea, water

10:15 – 11:30 a.m.: **2018 Retiree Benefits**, Penn State Room  
**Jill Musser**, Manager, Benefits Program, Human Resources, Penn State

11:45 – 1:00 p.m.: Lunch, Alumni Lounge (Build your own Lunch Buffet)

1:15 p.m.: **Bus departs from Nittany Lion Inn for Old Main.** Group photo inside.

Agenda, Big Ten Retirees Association Annual Conference (cont.)

1:30 – 2:30 p.m.: View **Land Grant Frescoes**, painter: Henry Varnum Poor.

Old Main lobby

History and interpretation by **Anne Riley**, Trustee Emeritus

2:30 p.m.: **Board bus for narrated Campus Tour**, Jane Wettstone, narrator.

Followed by guided tour (or free wandering) of **The Arboretum at Penn State**, also guided by **Jane Wettstone**.

4:30 p.m.: **Board bus** for return to the Nittany Lion Inn

5:10 p.m.: **Board bus** for transportation to the **Mount Nittany Winery**

5:30 – 6:30 p.m.: Wine tasting; social time with friends

6:30 – 7:30 p.m.: Buffet dinner at the Winery

7:30 – 8:15 p.m.: Talk - **Penn State and AccuWeather – A great relationship**, by **Barry Lee Myers**, Co-Founder and CEO, Accu-Weather

8:30 p.m.: **Board bus** for return to the Nittany Lion Inn

ENJOY THE EVENING AT YOUR LEISURE



Agenda, Big Ten Retirees Association Annual Conference (cont.)

**Sunday, August 5**

7:00 – 8:00 a.m.: Breakfast, Penn State Room (Dining Room breakfast buffet)

9:00 – 10:30 a.m.: Presentation - **Connecting Generations: Learning, Working, Living**, by **Dr. Amy E. Lorek**, Research Associate, Center for Healthy Aging

10:40 – 11:00 a.m.: Annual Meeting, Big Ten Retirees Association

11:00 – 11:45 a.m.: **Parking Lot Discussions** Now is the time to bring up anything that we should have talked about but haven't done so yet!

11:45 – 1:00 p.m.: Box lunches available for all registrants. Eat in the Penn State Room or take them with you.

SAFE JOURNEYS HOME!

***UNTIL NEXT YEAR, AT THE UNIVERSITY OF ILLINOIS AT URBANA - CHAMPAIGN***

Association Information by Institution

Big Ten Retirees Association Information - 2018

Activity	ILLINOIS	INDIANA	IOWA	MD	MICH	MSU	MINN	NEB	NU	OSU	PSU	PURDUE	RUTGERS	U WISC
Year begun	1971		1995		1953	1949	1976	1961	2001	1983	1947	1976		1999
No of retirees			683		10,000	4,700	552		~600	>20,000	>6,000	5,000		2,011
Living locally			579		5,000	605	527	466	~400	>12,000		65%		1,868
Membership growing/declining	1,850 D		G		1,704 G	G	expect G	662	600 G	>2,700 slight D	1,124 G	G		G - slow
Active members			~250		n/a	600	228	150	120	110	~250	2,900		15-25%
Dues (state and local)	\$41/yr		\$10 1 yr; \$25 3 yr		\$15/yr	none	\$30 single \$40 couple	1 yr free; then \$25/yr	none	\$25/yr w/spouse; \$500 life	1yr free then \$15/3 yrs	none		\$20/yr; \$100/6 yr; \$300/life
Exec. Comm/Board number	12		12		15	8	5 + 12	17	5+6+2	26-28	11	15		14
Newsletters/yr	2		10		3	7	8	2	4	12		10		10
General meetings/yr	2		1		9	Sept-May	8	5 or 6	9	11	6	12		1
Interest groups	none		2		n/a	15	5	OLLI	developing	8+10 comm.	n/a	yes		numerous
Joint programs with OLLI	no		no		no	no	no	2/term	no	no	no	no		no
Formal relations w/ alumni	no		no		no	no	no	yes	no	w/in alumni assn.	no	no		developing
Dedicated space	Sm. office on campus		no		Sm. Office, mtg. rm. access	yes	no	Room access	no	file; cust. Serv. Staff	no	no		small cubical

## Iowa

1. Membership: How many members does your Club/Association have? **683**
2. Who is included in membership? Faculty, academic staff, support staff, e.g., trades, clerical, etc.? Retirees only, or also active employees? **Faculty, staff, spouses of retirees, associate members (“friends” of UIRA)**
3. Is your association for your campus only, or does it include all campuses? If all campuses, do any of the remote campuses have ‘local’ meetings? **Our campus only**
4. Funding: What is your dues structure? **\$10 for 1 year or \$25 for 3 years**
5. What support do you receive from your University (include both financial and in kind if possible)? **None**
6. Benefits: What are the benefits of membership to the members? **Monthly programs (September-June, including speakers and tours of new facilities on campus), newsletter (September-June), annual University benefits session, annual flu vaccination clinic, photo contest, annual picnic, 2 special interest groups**
7. What benefits does your Club/Association provide to your University? **We have an endowed scholarship that grants \$1,000 scholarships to students. Otherwise this is hard to say since we don’t have any official ties to any university office, although our programming keeps our members are kept in touch with the intellectual life of the campus.**
8. Other: Is there a mandatory retirement age at your university? **No**
9. Is your retirement Club/Association represented on any University committees? **Funded Retirement Insurance Committee**
10. What other connections does your Club/Association have with your university? **The annual Insurance Benefits session is presented in collaboration with the University Benefits Office; HR provides us with names and addresses of people who have retired (though not email addresses); the University of Iowa’s Levitt Center for University Advancement manages our endowed scholarship (funds, application process).**
11. Does your association advocate for your university? How? **No.**
12. Do your members advocate for your university? How? **No reliable information.**
13. Do your members volunteer for your university? How are volunteer opportunities identified and publicized? **Yes. University-related opportunities and also relevant community-related opportunities are publicized to our membership through the email list and the newsletter. We do not publicize general volunteer requests that are not specifically relevant to our demographic.**
14. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)? **We are investigating the possibility of partnering with the Levitt Center for University Advancement for online management of our membership.**

15. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on the University? **Forming a relationship (financial or otherwise) with a campus office or center, especially the Center for University Advancement's reach in fund-raising for the university.**

## Michigan State

1. Membership: How many members does your Club/Association have? 4,700
2. Who is included in membership? Faculty, academic staff, support staff, e.g., trades, clerical, etc.? Retirees only, or also active employees? All retirees are automatically members along with their spouse or significant other.
3. Is your association for your campus only, or does it include all campuses? If all campuses, do any of the remote campuses have 'local' meetings? It is for all campuses. Historically, we meet at the main campus. Because it is centrally located and meeting space is available at no cost.
4. Funding: What is your dues structure? We have no dues. The association is funded through newsletter underwriter fees and donations.
5. What support do you receive from your University (include both financial and in kind if possible)? Office and meeting space, telephone service and copy machine use is provided by the university at no cost. The university through some of its departments provides funding as underwriters of the newsletter.
6. Benefits: What are the benefits of membership to the members? Newsletter (paper and electronic), eNotice email, web site of information and meetings with speakers on topics of interest.
7. What benefits does your Club/Association provide to your University? We provide volunteers for special events and activities. We work to keep a positive relationship between retirees and the university. Help communicate to retirees benefits and changes to benefits by working with MSU departments to compose these communications.
8. Other: Is there a mandatory retirement age at your university? No mandatory retirement age; exception is police officers, age 65.
9. Is your retirement Club/Association represented on any University committees? Not formally, but informally we do have relationships.
10. What other connections does your Club/Association have with your university? We have liaisons from Human Resources and Development/Advancement serve on our board.
11. Does your association advocate for your university? How? Yes. We promote positive relationships between retirees and the university. Part of this is keeping retirees connected and active. Many retirees advocate for the university by writing letters and email to legislative officials. Our 501(c) status does not allow us to take a more hands on active role.
12. Do your members advocate for your university? How? Write letters and emails on legislative topics that affect the university.

13. Do your members volunteer for your university? How are volunteer opportunities identified and publicized? Retirees volunteer on campus. Some are word of mouth, others are advertised on our web site and eNotices.
14. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)? Working to connect retirees to part-time job opportunities on campus. This helps provide a reliable supply of workers for the university and some extra money for retirees.
15. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on the University? Same as item #14 above.

## Illinois

**NOTE:** The University of Illinois at Urbana-Champaign State Universities Annuity Association (SUAA) Chapter is one of over 50 chapters of the state SUAA organization. SUAA was established to advocate for the current employees, the retirees, their spouses and survivors who will receive or are receiving benefits from the State Universities Retirement System (SURS). There are chapters at each of the four-year and two-year state universities and colleges.

1. Membership: How many members does your Club/Association have?

About 1850 as of May 2018

2. Who is included in membership? Faculty, academic staff, support staff, e.g., trades, clerical, etc.? Retirees only, or also active employees?

All retirees and current employees as well as their spouses and survivors are eligible for membership.

3. Is your association for your campus only, or does it include all campuses? If all campuses, do any of the remote campuses have 'local' meetings?

The Urbana-Champaign campus only. The other two campuses in the University of Illinois system have their own Chapters in the state organization..

4. Funding: What is your dues structure?

The annual dues are \$41 of which \$8.00 is the Chapter dues.

5. What support do you receive from your University (include both financial and in kind if possible)?

In kind contributions: Coverage of mailing costs for the two annual Chapter newsletters; provision of a small office; assistance from a liaison; printing and mailing the newsletters.

6. Benefits: What are the benefits of membership to the members?

Receiving information about and providing advocacy for the pension system, networking with other UIUC retirees.

7. What benefits does your Club/Association provide to your University?

Continuing connections to the university.

8. Other: Is there a mandatory retirement age at your university?

No

9. Is your retirement Club/Association represented on any University committees?

Association President or designee is an ex officio member of the campus Senate Benefits Committee.

10. What other connections does your Club/Association have with your university?

There are no formal connections as an Association.

11. Does your association advocate for your university? How?

There is no formal advocacy as an Association. The state and campus Association's advocacy for a strong pension system does this indirectly.

12. Do your members advocate for your university? How?

Many members do advocate for the university as individuals, often through existing connections with legislators.

13. Do your members volunteer for your university? How are volunteer opportunities identified and publicized?

There is no formal volunteer program within the Association. Our members volunteer individually in a number of ways such as mentoring students, facilitating study groups at the University's Osher Lifelong Learning Institute; and taking responsibility for Master Gardener programs.

14, What single *addition to* or *change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)?

n/a

15. What single *addition to* or *change in* the relationship between the Club/Association and your University would have the greatest impact on the University?

n/a

## Ohio State

1. Membership: How many members does your Club/Association have? >2700
2. Who is included in membership? Faculty and staff (mostly Academic).

>97% are retirees. Active employees over 65 years old can join as associate members.

3. Our association covers all campuses? If all campuses, do any of the remote campuses have 'local' meetings? Rarely, that we know of.
4. Funding: What is your dues structure? \$25.00/year covers retiree and spouse. Lifetime membership is \$500.00
5. What support do you receive from your University (include both financial and in kind if possible)? Merit-based (for programs) from the Alumni Association; ranges from \$250 to \$500 per program.
6. Benefits: What are the benefits of membership to the members? OSURA covers most: attending and monitoring pension and health programs, state and federal legislative news, many cultural events, domestic and international trips, monthly *Newsletter*, annual one-day conference covering many topics of interest for Seniors, senior discounts, etc.
7. What benefits does your Club/Association provide to your University? Volunteers.
8. Other: Is there a mandatory retirement age at your university? no
9. Is your retirement Club/Association represented on any University committees? Yes, we have a representative on the Faculty Compensation and Benefits Committee (FCBC).
10. What other connections does your Club/Association have with your university? Individually through various departments and divisions
11. Does your association advocate for your university? Yes through volunteers.
12. Do your members advocate for your university? Donations and at Departmental level.

13. Do your members volunteer for your university? Yes, through the Alumni Association.
14. What single *addition to* or *change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)?  
Return of funding support.
15. What single *addition to* or *change in* the relationship between the Club/Association and your University would have the greatest impact on the University? Consultantships.

## Penn State

1. Membership: How many members does your Club/Association have? *1,124*
2. Who is included in membership? Faculty, academic staff, support staff, e.g., trades, clerical, etc.? Retirees only, or also active employees? *Retired faculty and staff*
3. Is your association for your campus only, or does it include all campuses? If all campuses, do any of the remote campuses have 'local' meetings? *All campuses; no other campuses have meetings*
4. Funding: What is your dues structure? *First year free; \$15.00/3 yrs.; includes spouse/partner*
5. What support do you receive from your University (include both financial and in kind if possible)? *Modest financial support for this conference; modest reduction for members on luncheon meal one day/week; meeting space off Nittany Lion Inn dining room for Exec. Comm. meetings; inclusion in annual HR mailing to all retirees with health insurance updates; management of Financial Assistance fund.*
6. Benefits: What are the benefits of membership to the members? *Annual luncheon and annual picnic (added cost for food); 4 other meetings/year with a variety of speakers and topics; modestly reduced price for buffet luncheon at The Inn one day/week; semi-annual Newsletter to be resurrected.*
7. What benefits does your Club/Association provide to your University? *Significant financial and volunteer contributions on an individual basis; restoring communications with HR on various benefit discussions; emergency one-time financial assistance for retirees after confidential review (seldom used).*
8. Other: Is there a mandatory retirement age at your university? *No.*
9. Is your retirement Club/Association represented on any University committees? *Two (retired) Faculty Senators are elected by retired faculty.*
10. What other connections does your Club/Association have with your university? *Numerous individual connections; exploring possibilities for more mutually beneficial Club connections.*
11. Does your association advocate for your university? How? *Not formally.*
12. Do your members advocate for your university? How? *Individually: some, yes – but not as Club representatives.*

13. Do your members volunteer for your university? How are volunteer opportunities identified and publicized? *Done as individuals by individually-identified means.*
14. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)? *Continuing restoration of lines of communication that were fractured some years ago.*
15. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on the University? *Improved regular communication – we both would benefit.*

## Purdue

1. Membership: **5000**
2. Who is included in membership? **All Retirees including spouses**
3. Is your association for your campus only, or does it include all campuses? **Includes all Purdue Campuses, a few activities are facilitated at regional campuses**
4. Funding: **We have no dues; receive annual appropriation from University plus a number of sponsoring groups for special programs.**
5. What support do you receive from your University (include both financial and in kind if possible)? **We have one and half-full time equivalent staff support through the University Human Relations Office; we receive an annual appropriation for expenses from the University plus in kind support for web-site, newsletter, mailings and printing. The University maintains our mailing addresses and produces our electronics directory. All retirees and spouses receive free flu shots.**
6. Benefits: What are the benefits of membership to the members?

### **Purdue University Retiree Association**

#### **Retiree Privileges and Opportunities**

#### **Purdue Photo Identification Card**

#### **Discounts on Event Tickets**

#### **Staff Rates for Recreational Facilities and Golf Courses**

#### **Local and Distance Educational and Entertainment Tours**

## **Annual Purposeful Living in Retirement Conference**

**Monthly Luncheon and Speaker**

**Access to Purdue University Libraries Facilities**

**Free Issues of PURA News**

**Complimentary "A" University Parking Permits**

**Medical Plan Participation for over 2700 retirees and dependents**

**Use of Purdue University Pharmacy**

**Services at the Nursing Center for Family Health**

**Silver Sneaker Fitness Program**

**Purdue Discount Programs Offered Locally**

**Free Rides on CityBus**

**Temporary Purdue Employment Opportunities**

**For more information: [www.purdue.edu/retirees](http://www.purdue.edu/retirees)**

7. What benefits does your Club/Association provide to your University? **Through a short-term employment program, Purdue Retirees support a large number of departments in paid and unpaid positions. This program provides members with the advantage of receiving**

**notifications of non-benefit-eligible short term assignments and the option to apply, prior to announcing the opening to the community;**

8. Other: Is there a mandatory retirement age at your university? **No**
9. Is your retirement Club/Association represented on any University committees? **Yes, University Employee Benefits; University Investments; University Parking; and University Academic Affairs**
10. What other connections does your Club/Association have with your university? **The University manages our PURA Endowments that were established to support student scholarship and retiree activities. Our newest scholarship endowment started just two years ago now has a value of over \$1 Million dollars.**
11. Does your association advocate for your university? How? **Through the activities in answer 12.**
12. Do your members advocate for your university? **Yes, through fund raising activities, supporting pre-retirement workshops, participating in United Way Campaign with the University and through the community.**
13. Do your members volunteer for your university? How are volunteer opportunities identified and publicized? **We have a large number of retirees who volunteer each year as mentors to graduate students, teach special classes, serve on graduate committees, serve on committees and are major contributors to the University each year financial support totally an average of \$8M per year. Publicized through Newsletter and University Announcements**
14. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)? **We are very pleased with our current relationship with the University and feel very valued and supported by the administration. The Vice President for Human Resources is our official liaison and meets with our Executive Board monthly.**
15. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on the University? **We are always working to keep the needs of retirees in front of the university administration as personnel changes are made.**

## Michigan

1. Membership: How many members does your Club/Association have? **1704**
2. Who is included in membership? *Faculty and all staff* Faculty, academic staff, support staff, e.g., trades, clerical, etc.? Retirees only, or also active employees? **Only retirees**
3. Is your association for your campus only, or does it include all campuses? *It is for all the campuses.* If all campuses, do any of the remote campuses have 'local' meetings? **Yes our Dearborn campus and to a smaller extent the Medical campus.**

4. Funding: What is your dues structure? *It is \$15/year which includes your spouse or partner, we also have commercial sponsors(at \$600/year) and receive gifts and some funds from campus (Presidents Office and Human Resources).*
5. What support do you receive from your University (include both financial and in kind if possible)? *We get \$3,500 for operations from the Presidents Office, and \$3,000 from Human Resources for a special health day event each year. We get the little office, computer, desk, access to meeting rooms, and we have the access to two part time Administrative Assistants time. (\$30,000 with benefits). In addition we have a data base hosted on the University sever system as well as our web site.*
6. Benefits: What are the benefits of membership to the members? *Learning opportunities at the meetings, social interactions, day travel outings, information in the newsletters and monthly emails. In addition we will investigate and respond to questions or issues a member may be having with the University.*
7. What benefits does your Club/Association provide to your University? *Access to members for the annual benefits election process and feedback on proposed policy changes.*
8. Other: Is there a mandatory retirement age at your university? *No*
9. Is your retirement Club/Association represented on any University committees? *Yes, we have membership on the following committees:*
  - a) Senate Assembly (faculty)
  - b) PBOC- *Pharmacy Benefits Oversight Committee*
  - c) CESF- *Committee on the Economic Status of the Faculty*
  - d) MHAC – *MHealthy Advisory Committee*
  - e) *We are also on some ad hoc tasks forces on policy changes.*
10. What other connections does your Club/Association have with your university? *We are listed as an official affiliate and therefore can use the M logo on our sites and documents.*
11. Does your association advocate for your university? *We are in the process of structuring this function. How?*
12. Do your members advocate for your university? *In their everyday discussions, not in a formal process. How?*
13. Do your members volunteer for your university? *Yes. How are volunteer opportunities identified and publicized? We do not have a central process for this, however it is another item on our list to work on when we have a better web site to use.*
14. What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)? *We are working to be a closer partner to our University contact, Human Resources Office.*

What single *addition to or change in* the relationship between the Club/Association and your University would have the greatest impact on the University? *If we can develop a closer relationship to help with volunteer efforts, advocacy, and fund raising.*

## Wisconsin

<p>1. <b>Membership:</b> How many members does your Club/Association have?</p>	<p>2,013 members of which there are 1,325 households</p>
<p>2. <b>Who is included in membership?</b> Faculty, academic staff, support staff, e.g., trades, clerical, etc.? Retirees only, or also active employees?</p>	<p>Any retired or current employee and any spouse, partner, widow, or widower of a current or retired employee are eligible to join. This includes faculty, academic staff and university staff employees.</p> <p>Retirees with no UW affiliation other than friendship may join as associate members.</p>
<p>3. <b>Is your association for your campus only, or does it include all campuses? If all campuses, do any of the remote campuses have 'local' meetings?</b></p>	<p>Membership is open to UW–Madison, UW Extension, UW Colleges, UW Health, UW System Administration, Wisconsin Alumni Research Foundation (WARF), Wisconsin Foundation &amp; Alumni Association (WAA).</p>
<p>4. <b>Funding:</b> What is your dues structure?</p>	<p>Annual dues \$20;</p> <p>Bargain level \$100 (6 years for cost of 5)</p> <p>Life \$300</p> <p>We offer a half-priced level for those living outside of the Greater Madison area.</p> <p>For those “not yet retired” the rate is \$10/year.</p>
<p>5. <b>What support do you receive from your University (include both financial and in kind if possible)?</b></p>	<p>We have no formal relationship with the administration and receive no direct financial support. The Continuing Studies Department is providing UWRA with small office cubical and telephone line. We have a cordial relationship with the University administration. The chancellor’s office funds an annual reception for new retirees that we co-sponsor. In the past, the Chancellor has provided some financial support when Wisconsin hosted the Big Ten Retirees’</p>

	<b>Association.</b>
<b>6. Benefits: What are the benefits of membership to the members?</b>	<ul style="list-style-type: none"> <li>• Monthly newsletter, <i>The Sifter</i> published September-June</li> <li>• Access to a member-only portion of the website</li> <li>• Participation in all association activities <ul style="list-style-type: none"> <li>○ Financial seminars</li> <li>○ Health &amp; wellness programs</li> <li>○ Travel day trips</li> <li>○ Electronic technology programs</li> <li>○ Programs on current issues</li> <li>○ Social and</li> <li>○ Committees of the association.</li> </ul> </li> </ul> <p><b>Note: This year we held over 40 different events and 24 breakfasts.</b></p>
<b>7. What benefits does your Club/Association provide to your University?</b>	<b>UWRA has no formal role in the affairs of the University, except through the University's Retirement Issues Committee.</b>
<b>8. Other: Is there a mandatory retirement age at your university?</b>	<b>There is no mandatory retirement age.</b>
<b>9. Is your retirement Club/Association represented on any University committees?</b>	<b>Yes. The five association officers are voting members of the Faculty Policy &amp; Procedure Chapter 6 Committee: Retirement Issue Committee</b>
<b>10. What other connections does your Club/Association have with your university?</b>	<b>None</b>
<b>11. Does your association advocate for your university? How?</b>	<b>The UWRA is a 501(c)(4) organization and does no lobbying.</b>
<b>12. Do your members advocate for your university? How?</b>	<b>Not in any formal way. As former employes we are always informally advocating for the university.</b>
<b>13. Do your members volunteer for your</b>	<b>A letter is sent annually from the Provost and</b>

<p><b>university? How are volunteer opportunities identified and publicized?</b></p>	<p><b>Vice Chancellor for Academic Affairs to Deans, Directors and Department Chairs encouraging involvement of retirees in appropriate and productive ways. Departments follow by reaching out to retirees.</b></p> <p><b>Our Volunteering Committee is refocusing its energy to foster partnerships with UW affiliated organizations and engagement of retirees and coordinate UWRA collective and individual strengths to/with UW-Madison as retirees to support the UW and mission (Wisconsin Idea) and potential engagement opportunities.</b></p>
<p><b>14. What single <i>addition to</i> or <i>change in</i> the relationship between the Club/Association and your University would have the greatest impact on you, the members (individually or collectively)?</b></p>	<p><b>Have the university appoint a strong, active liaison with the retirement association.</b></p>
<p><b>15. What single <i>addition to</i> or <i>change in</i> the relationship between the Club/Association and your University would have the greatest impact on the University?</b></p>	<p><b>Encouraging volunteering in the university.</b></p>