

## Final Report

### Big Ten Retirees Association Conference Minneapolis, Minnesota August 8-10, 2014

#### Conference Summary:

The University of Minnesota Retirees Association (UMRA) was pleased to host the 2014 Conference of the Big Ten Retirees Associations at the Commons Hotel on the Twin Cities campus of the University of Minnesota. Attendees included representatives of twelve Big Ten institutions as well as guests from the Association of Retirement Organizations in Higher Education (AROHE). The conference theme of **Retiree-University Synergy** emphasized the importance of retirees and retiree organizations finding ways to provide sustained value to their university which may in turn make it easier for their university to be supportive of retirees and their retiree organization.

The conference began with a reception at the Commons Hotel at which attendees got acquainted with one another and with hosting UMRA members. Following a buffet dinner UMRA President, Hal Miller formally welcomed all to the 2014 Big Ten Retirees Conference. John Adams, UMRA Past President, then spoke to the group on the topic "Impact of Societal Culture Change on Organization Survival." He pointed out that most non-profit organizations are facing challenging times in that potential participants are reluctant to accept the responsibility of leadership positions, opting instead to be passively involved only when it is convenient and when it provides an amenity that I want (something for me.) The text of this presentation is available at [www.hr.umich.edu/umra/big10/big10conf\\_2014jsadams.pdf](http://www.hr.umich.edu/umra/big10/big10conf_2014jsadams.pdf).

Three content sessions on Saturday met in the University of Minnesota's recently constructed Science Teaching and Student Services building which includes a dozen active learning classrooms ([www.classroom.umn.edu/projects/alc.html](http://www.classroom.umn.edu/projects/alc.html)). Since conferences that involve panel presentations and discussion from the floor are generally considered to be more compelling than hour-long monologues the planning committee opted to split the Saturday program into three sessions each of which would make use of the panel presentation approach. Registrants were invited to indicate if they wished to be a panel participant in these sessions.

Session I focused on what retirees and retiree organizations can do in support of the university whereas Session II focused on what the university can do for retirees. Hal Miller (Minnesota) moderated Session I. Janette Brown (AROHE/USC) reported on activities of retiree organizations across the country as surveyed by AROHE. Results showed that retiree organizations tend to focus primarily on retiree fulfillment and privileges although many do include both university and community service or teaching. Jan Hogan (Minnesota) described the Professional Grants Program for Retirees sponsored by UMRA and coordinated with the U of M Office of

Research Administration. Over the past five years this program has awarded grants of up to \$5K to about 50 recipients. John Anderson (Minnesota) summarized the activities of the University Retirees Volunteer Center which focuses on identification of suitable projects for volunteers, recruiting volunteers, and matching volunteers with projects that interest them.

Session II - University Support of Retirees was moderated by Craig Swan (Minnesota). Fred Buetler (Michigan) distributed a history of the University of Michigan Retirees Association which illustrated that the relationship of the retirees organization with the university is often a reflection of the level of interest by key persons in the university administration. Dan Collins (Purdue) reported that Purdue University Retirees Association enjoys a very fruitful relationship with their administration. All Purdue retirees are members of PURA and Purdue HR is very helpful with maintaining contact information and publishing the PURA Newsletter. Sue Barnes (AROHE/UC-Davis) emphasized that one of the best ways to generate interest on the part of administrators is to “wiggle your way in,” i.e., get personally acquainted with key persons, learn about the major issues which they face, and then inquire how retirees might help. Sue reminded us that everyone responds to “WIIFM”, what’s in it for me! If retirees through organizations develop on-going programs supporting the mission of their institutions, the schools in turn will see it in their interest to support their retiree organizations. Synergy at work!

Session III dealt with communications in today’s technological environment. Ginny Hanson (Minnesota) described her role as UMRA Newsletter Editor and distributed samples of 4-, 6- and 8-page newsletters. With each successive year, more and more retirees are opting to receive newsletters via e-mail but many still prefer to have a paper copy in hand. David Naumann (Minnesota) summarized his activities as webmaster and outlined the developing plans to change the UMRA website to a more dynamic site which can be more readily kept up-to-date and which includes database functionalities.

A ninety minute walking tour led Kathy O’Brien (Minnesota) explored the campus including the central Northrop Mall, the beauty of the Mississippi River gorge as it separates the East Bank and West Bank portions of the campus, the Historic Knoll, the Church Street Mall, the Scholar’s Walk, and newly constructed facilities on campus. At two special stops featuring the Medical Devices Center ([www.mdc.umn.edu/](http://www.mdc.umn.edu/)) and at the recently relocated Nuclear Magnetic Resonance Facility ([www1.umn.edu/nmr/](http://www1.umn.edu/nmr/)) current staff members provided explanatory remarks.

For a relaxing and entertaining Saturday evening the group was bused to the Minnesota Centennial Showboat ([theatre.umn.edu/showboat/](http://theatre.umn.edu/showboat/)) moored in the Mississippi River across from downtown St. Paul. A buffet dinner was followed by a hilarious presentation of “Dr. Jekyll and Mr. Hyde with Musical Olios” featuring

theatre and music students of the University of Minnesota. A good time was had by all!

The Sunday morning program was devoted to reports from the retiree groups of the campuses represented. About 10 minutes was allotted for each report. Questions and commentary were encouraged. Many of the participants felt this was the most valuable session of the conference, since they were able to take away ideas for programming in their own association.

The morning concluded with a short business meeting in which Michigan State University was confirmed as the host for the 2015 conference. Two door prizes were determined by drawing names from the collection of names of registrants.

## **Planning and Organizing the Conference**

### **Early Planning:**

The date for the conference was determined about a year and a half in advance. A key consideration was to avoid overlap with the Minnesota State Fair which contributes much congestion to the area during its twelve-day run. With a date firmly determined the next step was to choose a hotel to serve as conference headquarters and to set aside a block of rooms for out-of-town attendees. Since the retiree associations are usually represented by one to four persons (often couples) the number of guest rooms to set aside was set at twenty (16 were eventually used). The number of participants was assumed to be about 25 with numerous local UMRA members choosing to participate in selected parts of the program schedule.

**Planning Committee:** John Anderson, chair, John Adams, Jan Hogan, Hal Miller, Earl Nolting, Kathy O'Brien, Richard Skaggs, Craig Swan, Pat Tollefson

The oversight planning committee included the chairpersons of special committees focused on meal planning, campus tour and hospitality. Committee members were recruited about 18 months in advance of the conference. Early action of the oversight committee was to determine a conference theme, ratify the dates and hotel venue. Review of past conference fees in comparison to anticipated costs prompted an increase in the registration fee from \$125 to \$150. Since the fee had been level at \$125 for several years an inflationary adjustment seemed overdue.

Consideration of a budget indicated that additional funds would be necessary to support the conference. On the basis of reports of previous conferences the budget was estimated to be about \$10K of which about half was expected to come from registration fees. Obtaining additional funds was complicated by the fact that AROHE had decided to schedule their biennial meeting to immediately follow the Big Ten conference. Support from the University would have to be split between

the Big Ten and AROHE conferences. The UMRA President, who had the best professional connections with University administrators, made the contacts and submitted the request. A number of reminder requests were submitted before a formal response was received. The U of M provided \$4K to support the Big Ten Retirees conference.

Attempts to obtain some support from other sources (Big Ten Network and Securian) were not successful. A prorated registration fee schedule was prepared to accommodate persons who choose to only take part in some of the meals.

**Meals Committee:** Jan Hogan

All arrangements for meals were negotiated by Jan Hogan in consultation with the Oversight Planning Committee.

**Hospitality Committee:** Pat Tollefson, chair, John Anderson, Cherie Hamilton, Nancy Helmich, Donald Clay Johnson, Sally Jorgensen, Geri Skogen

The hospitality committee assembled the registration materials which included name tags and lanyards, a U of M two pocket folder containing the conference schedule, the roster of attendees with addresses and telephone numbers, a U of M fact sheet, maps of the U of M campuses, a Minnesota Centennial Showboat flyer, and a discount coupon to the U of M Bookstore. Other items in the registration bag included a booklet describing and illustrating U of M undergraduate programs, a tourist guide to the Twin Cities, a Minneapolis map, a U of M Women's Club cookbook and several Minnesota specialties (wild rice, a Betty Crocker spatula, 3M transparent tape and Pearson's nut goodie).

**Announcements:**

The initial announcement was sent about six months in advance of the conference. All communications were by e-mail. An e-mail contact list was generated using registration lists from two previous conferences (from reports on the Big Ten Retirees web site) and by doing a web search for current officers of each association. A list of about a hundred contacts was assembled. Initial communications were issued to each retiree association using all available e-mail addresses for that association. Each message invited the recipients to share the invitation with other appropriate persons for whom we had no contact information. Invitations were also sent to the retiree organizations at Rutgers University and the University of Maryland (newly added to the Big Ten) but neither sent representatives.

Initial communications invited respondents to specify three topic choices out of six possibilities. Early responses were encouraged since the numbers expected were required by the hotel and caterers well in advance. Later communications with

those who registered included information about local travel (directions to the hotel by car or from the airport by light rail) and the conference schedule.

In retrospect, the announcements/invitations should also have been sent to the U of M Office of Human Resources.

**Program:** Planned by the Oversight Committee

The theme for the conference was decided to be “Retiree-University Synergy” since that would cover a broad base of topics but also help shape the discussion of a two-way mutually beneficial arrangement between retirees and the university. Concern was expressed that when retirees focus solely on what the university can do for them in terms of benefits and perks, there is little reason for the university to be hugely cooperative. Instead the conversation needs to emphasize that retirees and the retiree organization can be a very valuable resource for the university even before the development arm of the university comes calling for a big monetary donation.

Since conferences that involve panel presentations and discussion from the floor are generally considered to be more compelling than hour-long monologues the planning committee opted to split the Saturday program into three sessions each of which would make use of the panel presentation approach. Session I focused on what retirees and retiree organizations can do in support of the university whereas Session II focused on what the university can do for retirees. Session III dealt with communications in the technological environment. Registrants were invited to indicate if they wished to be a panel participant. Each session was scheduled for 75 minutes and limited to three panelist per session. The room selected for these sessions was an active learning classroom designed to facilitate participation by all present ([www.classroom.umn.edu/projects/alc.html](http://www.classroom.umn.edu/projects/alc.html)).

**Tour Committee:** Kathy O’Brien and Vic Bloomfield

Previous Big Ten Retirees conferences have featured a campus tour so we also wished to highlight our campus. A walking tour was decided upon since many of the stops are rather centralized and not readily accessible by bus. Furthermore, walking was deemed to be an excellent exercise and release after the three content sessions earlier in the day. The tour was planned by Kathy O’Brien and Vic Bloomfield, UMRA members who are extremely knowledgeable about the special features of the entire campus and who could provide interesting commentary. They also prepared a four page printed color handout which featured pictures of some of the tour highlights

**Schedule (as distributed at conference):**

**Big Ten Retirees Associations Conference**  
**August 8-10, 2014**

**Friday, August 8**

*Mezzanine, Commons Hotel*

1 - 6 pm Conference attendees check-in upon arrival

*Pinnacle Ballroom, Commons Hotel, East Bank Campus*

6:00 pm Welcome reception

7:00 pm Buffet dinner

8:00 pm Welcome Session - Hal Miller (MN)  
Impact of Societal Culture Change on Organization Survival,  
John Adams (MN)

**Saturday, August 9**

*Pathways Room, Commons Hotel, East Bank Campus*

7:30 am Continental breakfast

*Room 131A, Science Teaching & Student Services, East Bank Campus*

8:45 am Introductions - John Anderson (MN)

9:00 am Session I - Impact of the Retiree Organization  
Hal Miller (MN), Jan Hogan (MN), Janette Brown (USC/AROHE),  
John Anderson (MN)

10:15 am Break

10:30 am Session II - University Support of Retirees  
Craig Swan (MN), Fred Beutler (Mich), Dan Collins (Purdue),  
Sue Barnes (UC-Davis/AROHE)

*Room 445, Blegen Hall, West Bank Campus*

11:45 am Lunch

*Room 131A, Science Teaching & Student Services, East Bank Campus*

1:15 pm Session III - Communications  
David Naumann (MN), Ginny Hanson (MN)

*Assemble at Commons Hotel Lobby*

3:00 pm Walking tour of campus  
Kathy O'Brien (MN), Victor Bloomfield (MN), Greg Berger (U of MN Facilities Management)

Break

*Harvard Street Door, Commons Hotel*  
5:30 pm Board Bus to Minnesota Centennial Showboat, Mississippi River, St. Paul  
6:00 pm Cash Bar and Dinner aboard the Minnesota Centennial Showboat  
8:00 pm *Dr. Jekyll and Mr. Hyde* (with musical olios)  
University of Minnesota Department of Theatre Arts and Dance

### **Sunday, August 10**

*Pathways Room, Commons Hotel*  
8:00 am Continental breakfast  
  
9:00 am Reports of best practices from all Big Ten Retiree Associations  
John Anderson (MN)  
Representatives of each Big Ten Retirees Association  
  
11:00 am Annual business meeting  
John Adams  
  
12:00 pm Box lunch

### **Registrants:**

A spreadsheet of names, addresses, telephone numbers and e-mail addresses of all conference attendees was distributed in the registration packets. Twenty seven persons registered for the entire conference. Several persons registered for only portions of the conference (selected meals and/or showboat).

Illinois - Tom and Sharon Conry

Indiana - Jo Daron

Iowa - Ken Starck

Michigan - Fred and Suzanne Buetler, James and Mary Randolph

Michigan State - Angela Brown, James Brower

Minnesota - John Adams, John Anderson, Jan Hogan, Hal Miller, Dick Skaggs

Nebraska - John Bernthal, Julie Johnson

Northwestern - Fred Hemke, Ken Janda

Ohio State - Hallan Noltimier and Paula Rumbaugh

Penn State - Lynn and Melissa Carpenter

Purdue - Dan Collins

Wisconsin - Jan Richardson

AROHE - Sue Barnes (UC-Davis), Janette Brown (USC)

## Financial Report:

<b>Expenses</b>	
Commons Hotel	
Friday Evening Bartender	\$107.78
Friday Evening Reception/Dinner Food	\$3,183.26
Friday Evening Audio Visual	\$304.03
Saturday Breakfast	\$591.69
Sunday Breakfast/Lunch	\$1,527.87
Saturday Lunch and coffee break	\$343.84
Saturday Evening	
Showboat Dinner and Show	\$1,874.00
Bus to Showboat	\$692.00
Local Arrangements Expenses	
Walking Tour Printing	\$117.00
Photocopies - J.A. Reimbursement	\$48.81
Registration kit contents - P.T. Reimbursement	\$28.97
Registration kit contents - N.H. Reimbursement	\$124.41
Women's Club Scholarship Fund for Cookbooks	\$200.00
Registration Refunds	\$300.00
<b>Total Expenses</b>	<b>\$9,443.66</b>

## Evaluations:

**Summary of Evaluation Comments  
of  
Big Ten Retirees Association Conference  
August 8-10, 2014  
University of Minnesota**

### Overall the Conference was:

Excellent   \_\_8\_\_  
Very Good   \_\_6\_\_  
Good        \_\_1\_\_  
Fair         \_\_\_\_\_  
Poor         \_\_\_\_\_

### I particularly liked:

- Sharing with others

- Hearing about success
- The idea of the Centers and what they do
- Presentation the first evening
  
- Commons Hotel
- Session on Univ. support (#II)
- Best practices session (suggest that MSU start with Wis.; i.e., reverse order)
- Sat. evening entertainment package
  
- The overall theme was on target
- Also, U of Minn. was appropriately highlighted (e.g., tour of campus) as the host institution
  
- Impact of retiree org.
- The dinner and show event
- Reports from each school
  
- The interactions between member panels
- Speakers were brief
  
- The Showboat
- The tour of the campus
- The active learning classroom was a good venue-easy to make a point
  
- Panel presentations
- Best practices concept
  
- John Adams' talk
- Sessions I and II
- Best practices, but shorter talks
  
- Thank you for permitting us to attend the conference - absolutely excellent!
- We are gaining a great deal of information and contacts
  
- Best practices was very helpful. I especially liked those that gave me a bullet list of particular activities.
  
- Group/team format of sessions
  
- Discussion of what each organization has done and ideas for developing our own groups
  
- Adams post-dinner talk Friday

- All the ideas I plan to take back with me to benefit our Association
- The generosity and friendly spirit of our hosts
- Learning from other Universities & colleagues
- Sharing of individual association's experiences and best practices
- Sharing-Best Practices session. But give information beforehand in regard to time limits and what you are looking for.

**I wish we had:**

- A bit more content on scholarship of retirement etc.
- A bit more time for the best practices session
- More careful handling of the logistics of the conference, i.e., some folks did not always get information about meeting points
- More time to hear from each school
- Maybe a handout with pertinent info (3 of members, support from school, etc.) so it doesn't have to be covered
- I can't think of anything
- \*More controlled time constraints
- \*More "best practices" explanations
- Welcome from Pres or Provost
- Pre-conference survey of organizational size, budget and other data on organization
- Did well - keep it up
- Gotten a notebook and paper at the beginning of the conference
- Better control over speaker times: two in particular went on and on, adding trivialities and being repetitive
- Planning to minimize necessity for walking significant distances
- Record of findings. Maybe matrix of best practices & challenges
- Facilitator to "manage" discussion
- Round table discussions of challenges and group discussion of results

- Access to a copy machine for instant ability to share “one-only” hand arounds

**Future conferences should include:**

Reenergizing your association	__8__	NO: 1
Networking Big Ten Associations	__7__	
Highlighting the host campus	__3__	NO: 1
Other (Please elaborate)	__5__	

\*See comment marked with \* under “I wish we had:”

Human resources support

Recruiting new leadership

Understanding the stages of aging & programs tailored to stages

Dealing with differences in interests of new retirees and old timers

Give an in-depth overview of 2 or 3 of the associations

**Topics to include at next conference:**

- Things that could be done jointly that would benefit all groups
- A possible Medicare supplement across all institutions (Purdue would take the lead)
- Stick more closely to the schedule
- How to thrive in retirement
- Donations, in-kind service to organization
- Tables for brochures - that we could share with one for each
- Healthcare - post 2014 elections
- None, stick with the purpose of sharing info.
- How to improve relationships within the Univ: Pres., Regents/Board, Provosts, HR directors
- Liked best practices & problems
- How to perhaps increase active participation in our retirees associations by retirees
- Volunteerism - what we can do for our institution
- How to engage U HR in retirees

- Relationships - how to build, with whom, how to nurture
- “Best Practices” on recruitment/membership
- Where do we go for donations (if no dues or HR underwriting)
- Identifying retirees who have done lots of research, travel, writing since retirement and figure out how to convince them to associate “formally” with the retirees association