



University of Michigan Retirees Association

Volume 8, No. 6

February-March 2005

Social Hour Programs

February 10 Program: Anne Duderstadt will discuss an historical project upon which she has worked for a number of years. Her talk is entitled **The President's House--Through the Back Door**. It will be illustrated with slides.

March 10 Program: Professor Emeritus Gene Smith will show a video and slides about the University of Michigan's Solar Race Team, which has raced several times against other university teams in the US and against university and corporate teams in the World Solar Challenge in Australia. The cars have been designed and built by University of Michigan students from several areas of study across the University.

On April 14 our guest will be Monica Myklebust MD, an Assistant Professor in the Department of Family Medicine, who will speak on **Integrative Medicine--Blending the Best of Conventional and Alternative Medicines**.

IN THIS ISSUE

- Reports of November and December UMRA gatherings.
- An overview of past and present interests in forging a closer arrangement between UMRA and the University of Michigan
- An important change in our meeting location is coming in February. Please see the bottom of this page.
- A useful description of how to locate M-Care PPO medical providers when traveling outside the Ann Arbor area, plus a note about prescription drug benefit ID cards

A New Location for UMRA Meetings

Space for seating has been at a premium at several of our meetings of late. On one hand this reflects well on the program planning. On the other hand, it has too often proven to be very inconvenient for our members. Accordingly, the officers have made arrangements to hold the February, and subsequent, monthly meetings at the Best Western Motel, 2900 Jackson Ave., a short distance east of Webers. The facilities will be comfortable, the cost is low, and the refreshments are expected to be up to our past standards. A map on Page 3 shows the location of the Best Western Motel.

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Social Hour Details

UMRA Social Hours are held most months during the academic year on second-Thursday afternoons. The gatherings usually include light refreshments— sliced fruit, cookies, and soft drinks. All UM retirees are cordially invited to attend. Social Hour programs begin at 3:15 PM and continue until about 5:00 PM. Announcements about speakers and programs are made in this newsletter, in University Record *Events* notices, and at www.umich.edu/~hrraa/umra/, the UMRA web site.

Meeting Locations

Please check the meeting notice on Page 1 to find out the latest information.

The University of Michigan Retirees Association Newsletter

2072 Administrative Services Building, Ann Arbor, MI 48109-1432

The Administrative Services Building is located at the intersection of Hoover and Green Streets. Parking is available nearby.

Web site: www.umich.edu/~hrraa/umra/

President: Douglas Woolley, (734) 971-0124 (douglaswoolley@yahoo.com)

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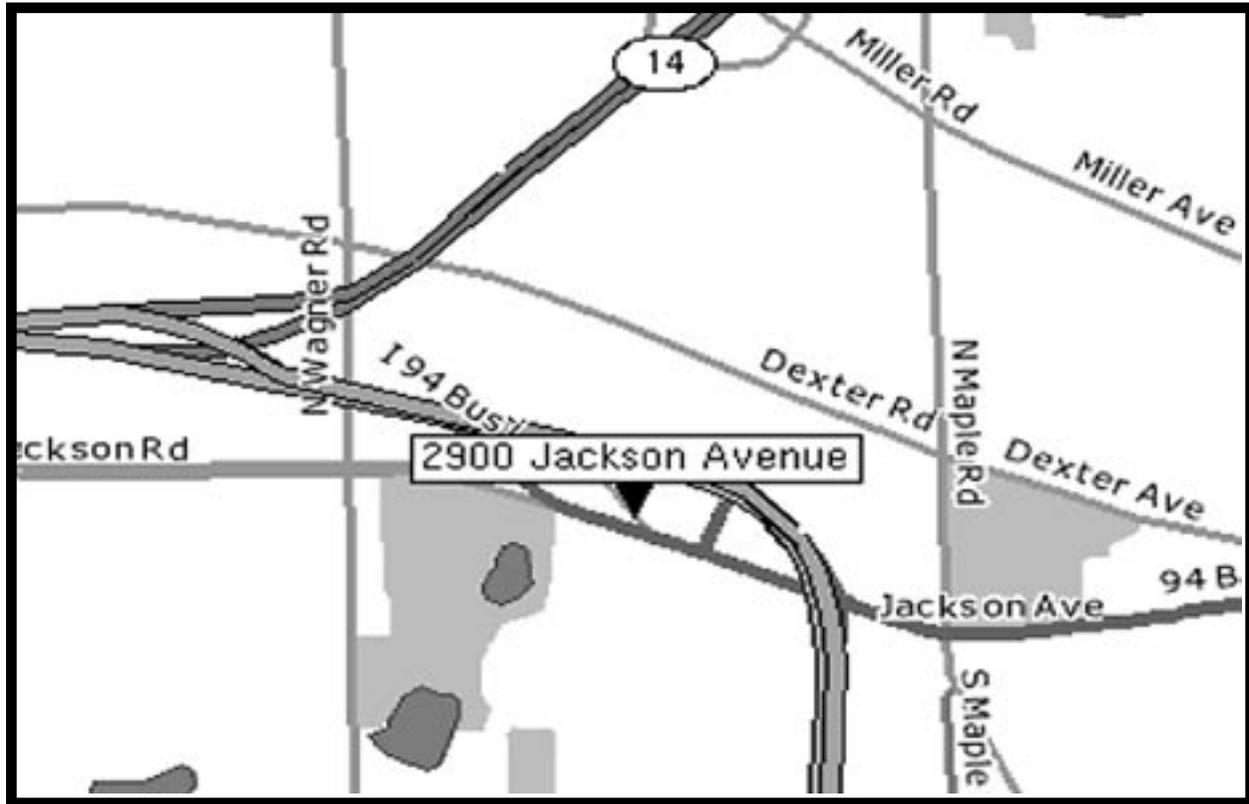
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LOCATION OF THE BEST WESTERN HOTEL



President Duderstadt's Nov. 11 Presentation

Former University of Michigan President James Duderstadt spoke to a capacity audience of UMRA members and guests about current items of interest to him, both within the University and in a broader national educational context. Many of the items he outlined are dealt with in more detail in books he has written since leaving the UM presidency, including “A University for the 21st Century” and “Higher Education in the Digital Age.”

He pointed out that Michigan has pioneered in many areas of education—UM was the first true public, non-religious university in America and, in fact, the first true university in the nation. The early presidents of UM—Tappan, Frieze and Angell—defined an education plan for “the common man,” for women and for people of all races. These are accomplishments of which we can be proud.

After this historical review of past educa-

tional achievements Dr. Duderstadt turned to a problem present on our campus and those of other NCAA members, which he described as one of extortion and exploitation. He referred, of course, to college athletics, primarily football and basketball. He decried the misuse of athletic scholarships, the inadequate educational achievement of many recruited student athletes and their low graduation rates as well as the move toward commercial sponsorships in college athletics, the large increase in ticket costs and the large salaries of coaches. Quite a list from a man who played college football himself!

What to do? First, eliminate freshman athletic eligibility. Second, make athletic scholarships need-based. Third, be sure of no conflicts of interest in the coaching staffs. Turn down commercial support of college teams—no COMPANY X Stadium, for example. Finally,

Continued on Page 7

DECEMBER 9 TOPICS: A NEW VENUE AND ELDERLAW

UMRA President Doug Woolley opened the December meeting with a review of the problems involved in finding a satisfactory meeting place for UMRA gatherings. He pointed to the present meeting as a good example—an overflow crowd occupied every available seat and some members had been seen leaving in frustration when they were left standing. He announced that the board has decided to move the meetings for February and for the rest of the academic year to the Best Western motel on Jackson Avenue. The January meeting will be the final gathering in Wolverine Tower. Please see the meeting notice on Page 1 of this newsletter for details as well as the map on page 3.

Fred Beutler introduced the speaker for this meeting, Elizabeth Woodruff, a lawyer specializing in estate law, especially as it affects senior citizens. He noted that she had received an award in 2003 from the State Bar Association for her work in this area. The title of her talk for our meeting was “Beyond Your Estate Plan—Maintaining Independence and Control.”



Ms. Woodruff listed a number of areas especially important to seniors—maximizing financial resources, keeping personal control of finances, assuring the personal choice of caregivers, reducing vulnerability to fraud, and

avoiding spousal impoverishment that can result from imperfect estate planning. She used as examples the complexities of Medicare and Medicaid rules. Potential recipients of benefits under these programs may require legal advice to take full advantage of them. She noted that the Michigan Family Independence Agency can assist in working with health-care program administrators but that applicants must have many kinds of relevant papers to prove their financial situation. She suggested several cautions as well, including a strong suggestion to avoid putting your house in trust without full legal advice, regardless of some published advice in the popular press!

Turning to other issues, Ms. Woodruff touched on the need for a Power of Attorney for Health Care, the potential problems of Petitions for Guardianship, the use of mediation in cases before Probate Court, and the need to be very cautious in the preservation and, ultimately, the destruction of financial records, whether in paper form or on computer hard drives.

In conclusion, Ms. Woodruff provided the following contact information for use in seeking assistance while wending one’s way through the complexities of elderlaw:

Self Help in Michigan

Legal Hot Line for Michigan Seniors

1-800-347-5297

Medicare/Medicaid questions (CSS)

734-712-3625 or 1-800-803-7174

Michigan Office of Service to the Aging

1-517-373-8230

Sixty-Plus Elderlaw Clinic

1-517-334-5761

National Self Help:

Medicare: 1-800-633-4227,

www.medicare.gov

Center for Medicare & Medicaid Services

www.dms.hhs.gov

For more information on these topics Ms. Woodruff can be contacted at (734) 320-5730 or by e-mail at e.woodruff@att.net.

IS UMRA AFFILIATED WITH THE UNIVERSITY?

by Frederick Beutler

The simple answer is NO. No, we do not have a status similar to that of the University Musical Society or the Alumni Association. Although we have requested affiliation a number of times, the University has not responded positively.

This does not mean that we (as an organization) do not receive benefits from the University. Far from it! The University has been good to us. It has helped us, and is continuing to help us, in a major way.

To understand how we got to the present state—no affiliation but a lot of connections and financial assistance—we need to delve into the history of UMRA, or as it was once known, the University of Michigan Annuitants Association.

We go back over fifty years, to 1953. At that time, a retirees organization hardly existed. Membership was about 100 strong, as judged by the size of the mailing list. Only retired faculty, higher administrators, and their spouses and widows could belong. The University barely recognized our existence, although we were allowed to use classrooms for meetings. The Constitution read: "The dues of the Association shall be voluntary and shall be one dollar (\$1.00) per year per member or family. To reduce handling cost, it is suggested that the dues be paid in cash rather than by check."

Since the dues were voluntary, it was hard to ascertain who was a member, but the Association President believed that compulsory dues made the organization vulnerable to a takeover by labor unions.

Occasional meetings and irregular newsletters constituted the activities of the Association until (in 1989) Professor Everett Soop willed the Association a sum (about \$10,000) which was to be used to provide monthly socials for the Association. These socials were generally held in the League, and included not only soft

drinks, but also cheeses and sherry.

The Soop bequest was carried by the University in a so-called Agency Account. This enabled the cost of the social (about \$8 per attendee) to be charged to the Agency Account by the League. It should be mentioned that any expenditures from the Account required approval of a University administrator, which was always granted, but nevertheless seemed to be an annoyance. What we did not know at the time is that the Agency Account would come in handy later on, in that, as an unaffiliated organization, we could not otherwise have obtained the use of University facilities and services. More about that later.

In the late 1980s, other changes took place. The Association nominated a non-voting representative to the Senate Assembly and a member of the Committee on the Economic Status of the Faculty. Since these were both organized through faculty governance, they did not represent recognition by the University administration.

The idea of voluntary dues of a dollar had been abandoned for some time, and more realistic obligatory dues of \$5 (later \$7.50) instituted. Nevertheless, given the expense of the socials, the financial fortunes of the Association continued to decline. It seemed that the Soop Fund would soon be exhausted.

In 1993, there were repeated discussions with the Provost; the Annuitants Association requested financial assistance as well as affiliation. Affiliation was summarily rejected, but the administration responded to the extent of making a one-time grant of \$3500, and paying for one Association delegate to the Big 10 Retirees Association Conference, which was held at the University of Minnesota in August 1993. Our request for an on-campus office was turned down. So were later requests for further financial help; we were repeatedly reminded

Continued on Page 6

that the funds granted thus far were strictly "one-time."

Further changes after 1996 involved turning the Annuitants Association into the University of Michigan Retirees Association, which, as a nonprofit 501(c)(3) corporation, could receive contributions on a tax deductible basis. By this time, membership had grown to approximately 1000, and now encompassed all retirees, their spouses, and their survivors.

Regarding support of the retirees organization by the Administration, the most significant change occurred shortly after Lee Bollinger became President of the University. Following an invited talk to UMRA in April 1998, he asked what help we needed, and responded by providing the following assistance:

- An office within Human Resources
- A computer and support
- A secretary on a quarter time basis
- Postage for UMRA mailings

We have had the benefit of these items ever since. They have been of inestimable value in building and maintaining our organization.

By the year 1999, the UMRA Board again was seriously discussing the implications of affiliation. It was understood that the advantages of affiliation would include:

- Liability insurance and bonding coverage
- Michigan tax deductions for contributions
- Legal assistance when requested
- Elimination of separate filing of government forms
- Feeling of being "part of University family"

On the other hand, there were also drawbacks, namely:

- Need to change the UMRA Constitution
- Confirmation of UMRA Board by Board of Regents
- Ex officio Board representation by

University administration

- Conformity to University policies for purchasing
- Filtering of contributions through Gifts Office and Accounting

The Board felt that affiliation, on balance, was highly desirable. Negotiations with the Administration began, and continued through 2001. The Board agreed on the Constitution changes requested by the University's Legal Counsel, and reached an understanding with a representative of the Administration on operations with respect to contributions and purchases. He indicated that this information would be presented to the Administration for their approval, whence affiliation would be recommended to the Regents.

Shortly thereafter, President Bollinger resigned, followed by the exit of the Vice-president of Finance, University Counsel, and finally, the retirement of the Associate Vice-president who had acted as liaison with the UMRA Board. Not having received any Administration response, the Board inquired of the status of affiliation approval, only to be advised by the General Counsel of a whole series of new (and different) requirements that needed to be met. In effect, affiliation was dead. On further discreet inquiry, our back door contacts in the Administration advised us to "cool it" insofar as seeking affiliation was concerned.

We hoped that the advent of President Mary Sue Coleman would produce a more favorable climate for affiliation, but this has not been the case. Some informal approaches have not produced favorable results.

Near the beginning of this report I noted that having an Agency Account with the University has fortunate implications. When we planned for the Big 10 Retirees Association Conference under our auspices in 2003, we were repeatedly asked (e.g. by the Business School and the Michigan League) whether we were affiliated with the University, this being a requisite for obtaining service from these facilities. As

UM CONNECTION, Continued from Page 6

it turned out, what they really needed was not affiliation, but rather a University account number. Having established an Agency Account earlier, we were happy to be able to comply, and hence to hold the Big 10 Conference in University facilities.

EPILOGUE

While the University has repeatedly repelled UMRA requests for formal affiliation, we as an organization have benefited greatly from University largesse. Most of the help has come quite recently, perhaps as an increased

understanding of the importance of retirees as part of the University family.

On the face of it, UMRA is not particularly influential with respect to University policies. Nevertheless, we have been consulted regularly on retiree benefits, and especially medical benefits. One indication of this is the retiree representation on the Prescription Drug Program Oversight Committee. Most recently, our lobbying since 1998 for computer privileges for retired staff has borne some fruit; all retirees are now entitled to a free e-mail mailbox.

DUDERSTADT, Continued from Page 3

insist on complete financial audits of athletic programs. Pres. Duderstadt pointed out that university presidents are caught between their educational concerns and pressures from enthusiastic tailgating alumni, businesses, and politicians. He predicted that college athletics programs are heading "toward the edge of a cliff." To work toward solutions he suggested a

coalition within NCAA of the "old line" schools, led by Michigan and including like-minded members within, in particular, the Big Ten.

Members of the audience familiar with UM athletics pointed out that faculty involvement in the Board in Control here has disappeared and that this is not a good thing. Pres. Duderstadt agreed!

Information about the New M-CARE PPO PLUS

There have been questions about how to locate M-Care PPO Plus health care providers when travelling outside of the Ann Arbor area. Here is an explanation from the Human Resources office, extracted from the M-Care Provider Directory by Jane Miller, Manager, HR/Payroll Service Center, 734 647-0013:

Inside Michigan one must use the PPOM network to identify providers. Note that the PPOM network includes UMHS providers. In IL, IN, KY, OH, and WI one may use either the PPOM or Superien network to determine covered providers. In all other states one must use the Superien network to find covered providers.

Here are the relevant web addresses:

M-Care organization: <http://www.mcare.org>

M-Care Provider Directory: <http://www.mcare.org/include/template.cfm?>

UMHS network: http://www.mcare.org/media/pdf_autogen/directory_ppoplus.pdf

PPOM network: http://www.ppom.com/ppomui/find_a_doc/search.aspx

Superien network: <http://www.chandler-group.com/shn/ShnGetState.cgs?app=pdf>

Please note that .pdf files require use of the Acrobat reader, or another software package that opens .pdf files

Announcing a Special Event for UMRA Members

Starting on March 1 members may sign up for a March 31 tour of the new UM Life Sciences Institute, located on Washtenaw Ave. across from Palmer Field. This large building project is a very visible addition to our campus and tours will be arranged to demonstrate the variety of work now underway. Following the tours light refreshments and a presentation about Institute projects will be offered. In order to accommodate the expected crowd more than one tour will probably be needed and reservations will be required. Please call Bridget Kerr at the UMRA office (936-8626) after March 1 to reserve your place at this special event.

A Message about Caremark Prescription Drug ID Cards

"We have become aware that some dependent information may be incorrect on the newly issued drug benefit cards from Caremark," says Keith Bruhnsen, Assistant Director, UM Benefits Office. "We are aware of the problem and are actively working with Caremark to identify and correct errors and reissue ID cards to members. We expect to have all errors identified by mid-January. We do not anticipate any large amount of disruption to our members and certainly will assist any member who needs to obtain their prescription medication. If you learn of any concerns please contact Caremark ASAP at 1-866-486-0268 and/or contact the HRAA Service Center at 734-615-2000 so we may respond immediately."