

EXECUTIVE SUMMARY,

UMRA Membership Survey Report, Conducted Nov 2021 to Jan 2022

Goals:

The overriding goals of the survey were to assess the expectations of members toward UMRA and their motivations to participate. Findings of the report will inform strategies to (a) increase membership and (b) increase the level of engagement in UMRA programs and activities.

1. Survey:

UMRA conducted a survey of members (n=1505) using Qualtrics survey software. The survey was conducted from November 2021 to January 2022 with three reminder surveys after the launch. Information was analyzed using Qualtrics tools, reviewed by the UMRA survey subcommittee, and discussed at the Board retreat. The survey included 632 complete and 66 partial responses generating an overall response rate of 46% and was considered representative of the entire pool of members by several different criteria.

2. Responses:

The survey included 8 demographic questions, 14 questions focused on UMRA activities, and 3 open-ended questions.

Demographic response percentages are shown below after aggregating finer response options into two major groups. These major groups were used to examine correlations with other question responses. Age and residence were dominant factors affecting response distributions in other questions.

	<i>Major response:</i>	<i>Minor Response:</i>
Years UMRA member	54% (0-5 years)	46% (>5 years)
Age	64% (<=74 yo)	36% (>=75 yo)
Gender	69% (Female)	30% (Male)
Ethnicity	86% (Caucasian)	14% (All others)
Residence Location	81% (Washtenaw+Adjacent)	19% (All others)
Faculty/Staff status	77% (Staff)	21% (Faculty)
Campus Location	92% (AA+Mi Medicine)	05% (All others)

Regular survey questions covered member use of communication services, perceived usefulness of services, attendance at monthly meetings, and advocacy efforts. Key results are the following:

- 43% of members initially became aware of UMRA via an HR retirement planning seminar.
- UMRA activities (especially newsletter, website, and advocacy) had the best responses for usefulness. The newsletter received the highest usefulness response. There was no dissatisfaction with any UMRA activities.
- Surprisingly, attendance frequency was less than 21% for in-person options with only 37% attending monthly meetings. Reasons for not attending were primarily distance, busy schedules, and time of day. Still there was strong positive response for future in-person activities.
- Most popular shared interest options (originally designated as special interest groups in the survey) for future UMRA activities included exploring sites on U-M campus, travel, cooking, baking, genealogy, current events, and history.
- There was general interest in volunteering for future health day, travel program, volunteer activities, and new member outreach.
- There was positive interest in advocacy efforts with most focused on issues related to health insurance.

All three open-ended question responses were categorized into 15 standard groups and analyzed in terms of demographic information. These categories were developed by two Board members.

Response counts are reported below for each of the categories (rows on left side) for each of the three open-ended questions (columns on top row). The number of responses (not percentages) are reported in the table.

<i>Topics Used for Collecting Responses</i>	<i>Q1 -- Other Activities</i>	<i>Q2 -- Specific Advocacy Issues</i>	<i>Q3 -- Final Comments</i>
Advocacy/Health	1	6	2
Advocacy/Other	0	22	2
Communications	0	4	4
COVID	2	0	22
Discounts	2	19	0
General/Good Job	18	13	108
Gyms	6	12	1
Meetings/Topics	12	11	6
Meetings/Venues	3	3	26
Outings/Day Trips	18	4	6
Special Interest Groups	41	1	0
Technology/How-To	4	1	0
Technology/HW-SW	0	9	1
Volunteering	3	1	1
Others	3	4	10
TOTAL Comments:	113	110	189

3. Trends and Conclusions:

UMRA activities appear to predominantly serve younger members (<=75 years old) who live in Washtenaw or immediately adjacent counties. This correlates with general mobility and ease of access to monthly meetings. Retired white, female, U-M staff members dominate the UMRA membership.

It may make more sense for the future to tailor UMRA services to meet the desires separately of those who can and cannot attend meetings. There was a significant positive response to options for new shared interest groups within UMRA. The few groups that have recently formed (UMRA Reads and UMRA Walks) have had strong responses from participating members. Retirement associations seem to divide into those stressing monthly meetings (meeting-centric) versus ones focusing on shared interest group activities with only occasional member meetings. The goal for UMRA in the future, perhaps should be to try to focus equally on both of these goals.

Communication services (webpage, newsletter, emails,) appear to have increased dissemination of information among members, but many services are still unknown to current members. Recording of monthly meeting sessions was rarely utilized, but still reported as a desirable option. COVID created great strains on the UMRA systems. Meetings were offered virtually using ZOOM to maintain a connection to the membership. However, members clearly voiced their desire to meet in person when possible.

New shared interest groups garnered significant immediate interest. These seem to be important as future growth areas for UMRA. They will depend on individuals willing to step forward to lead these activities. The Board is heavily committed to maintaining all current activities. Responses from 10-20 individuals in the survey identified volunteers for future roles leading different activities.

For all three open-ended questions, there were overwhelmingly positive responses about UMRA and the Association's work.