	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
2	Question/Category	Explanation	California (UCLA)	ILLINOIS	INDIANA	IOWA	MARYLAND	MICH	MSU	MINN	NEB	NU	OSU	PSU	PURDUE	RUTGERS	Southern Cal (USC)	WASH	WISC
3	**Year began**	*When was your association established?*	1969	1971	1975	1995	2017	1953	1949	1976	1961	2001	1983	1947	1976		1978	1975	1999
4	**Legal Status (e.g. 501 c3)**	*What tax law do you operate under? Most fall under some version of 501 c*	Legal entity: Retirees Assoc. / Emeriti Assoc are 501c7 (social	501c4	501c3	part of UI	part of Md	501c3	501c(5)	501c4	N/A	part of NU	501c4	501c3	n/a - dotted line to PU		NA	501c3	Currently 501(c)(4). Starting to investigate a change to 501(c)(3)
5	**Number of retirees/ emeriti eligible to join your association**	*How many retirees does your university consider as living retirees? If an Emeriti only association, how many living Emeriti retirees?*	19,332 all database	Uncertain. Mbrship is not limited to retirees/emeriti	There are about 3,800 retirees	~460	~1000	13,614	over 7,500	Many, many retirees over many decades. No one knows how many are living	Uncertain	Retiring faculty that serve 10+ continuous years AND who receive approval from their Dean and Board of Trustees.	>20,000	>6,000	>5,000		>5,000	accounting estimates (~600 individuals retire each year) Membership open to current employees and retirees from other higher	~ 350-550 individuals retire annually. All are eligible. Mbrship is open to anyone- not just UW retirees
6	**Who is eligible for membership?**	*Who can join your association? Options for response: all university retirees, only those who pay dues, only Emeriti retirees, anyone can join, other.*	All retirees	All members of the State Universities Retirement System (SURS) including current faculty-staff, annuitants (i.e., retirees), their spouses/partners, and survivors	All retirees who worked at IU, even if they did not qualify for IU retirement & spouses	Faculty & Staff Retirees, unaffiliated spouse/partner, those with significant employment history who are no longer employed (but not considered to be retirees by the university (i.e., adjunct instructors)	All UMD retired faculty	UM retires who pay dues	MSU faculty, staff and spouse are automatically members upon retirement	UM retirees who pay dues	All university retirees. Collegial membership (dues paying) may be granted by the UNL ERA Board of Directors to any person residing in the area who has officially retired from another accredited baccalaureate degree granting institution. Also eligible are former UNL faculty or staff members who provided ten or more years of service to the University, and are retired	Faculty that achieve emeriti status.	all OSU retirees who pay dues. Will consider others associated with OSU	all PSU retirees, faculty and staff who pay dues which include spouse/partner	all retirees - no dues		All university employees, both staff and faculty who retire in good standing.	All UW retirees; current UW faculty/staff; retirees of other institutions of higher education; spouses/partners/surviving spouses/former spouses of all above groups	Mbrship is open to anyone- not just UW retirees. Additionally membership is open to the individual's partner, spouse, widow, or widower at no additional cost. Individuals with no affiliation other than friendship may also join.
7	**Membership**	*How many members does your association currently have?*	Emeriti Association (EA) = 750 Retirees Association (RA) = 2,100	1,400	423	538	245	1,878	5700	875	850	730	2,100-2,200	1,144	same as #6		over 5000	4,000	1,850
8	**Is membership growing/declining**	*Has your membership numbers changed over the last 5 years? LD for large decline SD for slight decline S for stable SI for slight increase or LI for large increase*	Growing	D	Slight Increase	Steady at the moment; but growing with initial free year as introductory members who are encouraged to join.	growing	steady	G	G	Sly	G slowly	slight D	D	G	steady		Growing (up 37% since 2020)	Slight decline since coming out of COVID
9	**Members living locally**	*How many of your associations members live within a one-hour drive from campus? Best guess if info not*	81%	850	386	465 living locally	~120	1,600	3000	estimate 2/3	~750	~350	1,761	1,086 in PA 870 in county	65%		4,200	3,750	Of the 88% living in WI, 65% live in the Dane County
10	**Membership attendance at general meetings**	*Number of people typically attending general membership meetings*	EA/RA boards meet monthly (20 board members)	5 - 10%	< 20%	~50 at annual meeting ; <10% at monthly programs		100	30-70	85 to 125 at in person events 40 to 100 for Zoom	13%	10%	20-25%	10-15%	0		100	30% (in person) 50% (virtual)	20-25% Our gatherings are not "meetings", but seminars presented virtually or in-person
11	**What are your dues?**	*What are your association dues structure?*	First year free, $25 single, $35 partnered, free over 85	$41/yr	First Year Free, then $30/ yr; $40/couple	1 yr free, $12/yr or $30/3 yrs	Suggested annual donation of $50	$25/yr	none	$40 single, $60 dual (first year is free)	1 yr free, then $25/yr	none	$25/yr w/spouse, $500 life	$15 per year includes spouse/partner.	none		No dues for the RFA; SRA $50	1st year of retirement complimentary, then $50/household/yr	$30/yr; $150/6 yr; $400/life; Out of Area & Not Yet Retired half-price (all levels incl. spouse/ partner)
12	**What monetary support do you receive annually from your University?**	*What fiscal support, including staffing support do you receive from your University?*	$25,000	None	None	None	Support for 1 officer to BRTA meeting (~$2k)	$3,500	HRS 2,000, Advancement $2,400, MSU Health $2,800	$4,000 for Volunteer Center only	$0.00	Annual budget, + staff and ofc space.	$1000 from Alumni Assoc. with Scarlett status	None	$17,000		Salary support	$0.00	$0.00
13	**What staffing support received from your University?**	*What staffing support do you receive from your university? Please include number of staff and if full or part time.*	2 FT,1 PT	None	None	1/4-time Administrative Assistant out of the HR department.	1 GA student (20 hrs), occasional staff and assoc dean consulting	4 staff in our HR assist us on a PT basis	none	none	N/A	1/2 staff person	Alumni Assoc. staff help with registrations, website and print of dues and all events. Also handles their membership database.	None	Clerical		Two Co-Directors	2 FTE in permanent, dedicated staff	no support
14	**Other funding sources**	*What other sources of funds do you receive? E.g., sponsors, donations, or other.*	EA/RA $3,000/year each - $6K + Belmont Retirement + Fidelity +local credit union		None	Donations to our Foundation to support 2 -3 undergraduate scholarships each year--not direct support for our programs.	Donations	18 sponsors at $600/yr each	Sponsorships - 4 outline entities-$10,000	Sponsorships for in person Forums	Goal to begin sponsorships	Office of Provost funds.	dues, donations, endowment income	None	Sponsor donations		Foundation	Partnership with Era Living, endowment income, donations in addition to dues	none
15	**What is your fiscal year?**	*What is your fiscal year for reporting purposes?*	July - June	calendar year	September 1 to August 31	July 1 - June 30	July 1-June 30	Sept 1-Aug 31	July 1-June 30	July 1-June 30	January 1 - December 31	Sept 1-Aug 31	July 1-June 30	calendar year	July 1 to June 30		July 1 to June 30	July 1 to June 30	July 1-June 30
16	**Newsletters/yr**	*How many newsletters do you send to your members annually?*	2x month	2	8	10 per year	10	12	7	4 print, 8 enews (headlines linked to website content)	4	4	12	4	10		Weekly event report.	Print: 1 newsletter/annual report; 3 quarterly event postcards Email: 3 quarterly (extensive); 50 weekly email digests	10
17	**Number programs/ events offered annually open to all members**	*How many meetings & events do you provide each year, including membership meetings, travel programs, shared interest groups, etc.? Do not include Board/ committee meetings*	24+	2	8	15-20	8	142	14	19 plus special interest groups	20 - 30 per calendar year	6	Offer ~70 events/year. Open to All	6	15 to 20		30	50-60	All. Offer 30-45 program/events per year
18	**Do you offer programs during summer months?**	*Do you offer programs during the summer months? If so, what kind?*	yes, minimal	No	No	No	No	travel committee trips and SIG's	Yes	Yes (usually 2 social events)	Yes	Possible, but not usually.	yes-varies to type	6	yes		Yes	Limited to 2-3 max	day travel trips & monthly breakfast gatherings
19	**Do you offer evening programs? Do you offer programs on weekends?**	*This is a two-part question Do you hold evening meetings? Do you hold weekend meetings?*	yes, minimal	No	No and No	No	No	a few	No	No	No	Evenings-Yes Weekends-No	Yes	no	no		Evenings No; weekends yes	Only when the topic/venue requires it	not currently
20	**How many general membership meetings with speakers do you have each year? How many include business meetings?**	*This is a two-part question How often do you hold general membership meetings with speakers? Is official business conducted (e.g., elections, bylaw changes) at one or more of these meetings?*	Every program has a speaker element	Yes, 2 per year	8 General Membership Meetings with speakers. One Annual Business Meeting in April for Elections and Bylaws Changes	Only one general business meeting per year in June	One annual meeting on zoom in May for elections & updates	9 with one business meeting	Yes, Annually, 1 meeting	16 general meetings of which one includes a business section, plus 3 social events	8 General membership meetings and also include business meetings	1/year, but can conduct business at events	Yes, once per year (June)	6 general meetings with speakers or a tour of a location of interest, 1 business meeting included	yes, usually just once a year, but any monthly meeting can be a business meeting		Two Business meetings; 15 speaker meetings	No, all business is conducted by the board of directors, whose meetings are open to the membership as desired	We have one annual meeting at which associations business is conducted. It usually includes a speaker from a university department.
21	**Joint programs with OLLI**	*The Osher Lifelong Learning Institute (OLLI) provides learning experiences for those 50 years and better with classes, special interest groups, and group trips. Does you association do any joint projects with OLLI?*	yes	No	No	No	No	no	no	no	2 - 5 joint programs	no	no	No	no		No	No, but members receive a discount on OLLI membership/courses	UW has PLATO. Participatory Learning and Teaching Organization. We are partnering with PLATO on some program offerings and day trips.
22	**Do you have a formal relationship with Alumni Association**	*Do you have a relationship with the Alumni Association at your University? Provide any details you care to share*	yes	No	No	Informal relationship through "8 over 80" awards and "Grandparent University"	No	yes	Yes	Yes	yes	no	Yes	No	no		Yes. Affiliated loosely	Yes	no
23	**Do you have a formal relationship (MOU) with your institution?**	*Do you have a formal relationship with your University with a Memorandum of Understanding (MOU), or similar written agreement?*	yes with Belmont Retirement Community	No	Not currently, but we are exploring a MOA.	Yes, established 2023	Yes	yes	Yes	Yes	Recognized as a formal association by UNL, but no MOU	No, we operate informally	Yes	No	no, but university approved original bylaws		No	Yes	In the works
24	**Does your association have a formal relationship with a specific office at your University If so, which**	*Do you have a specific University office that you work with? Examples, human resources, provost's office, etc.*	Academic Personnel	None	Human Resources for Benefits and Provost Office for United Way Campaign	Human Resources, President's Office	Provost's Office-Faculty Affairs	Human Resources for President's Office	Human Resources	Provost	Human Resources for membership	Provost's Office	Alumni Association	Human Resources	Human Resources		The Center is sponsored by the Provost's Office	University Advancement	No
25	**Dedicated space**	*Does your University provide with any dedicated space for meeting meeting rooms, office space, storage space, etc. Please list any*	Office, 1000 sq ft	Small Campus office	IU Foundation provides meeting space, but no dedicated space	Dedicated meeting space	No	Small office & mtg. room access	Small office & mtg room access	Yes - shared office	Room access	Small office & mtg. room. Access to larger rooms	file, Cust. Serv. Staff	No	local VFW for monthly meetings and university building for committee meetings		Yes.	Dedicated campus office for 3 staff, access to meeting and event spaces	small cubicle, and phone
26	**Access to Univ. licensed software (Yes/No) Is it free (F) or Purchased (P)**	*Does your University provide any licensed software for your association use? Is it free or purchased? Please list all*	Free - everything students have. Emeriti also have software access, not retirees	None	No	Yes; free	YES - mostly free	No, but board members do get expanded zoom	Yes	No	Yes and Free	Yes	Only emeriti faculty	No	no		Yes	Yes, Free	No (institution license no longer allows)
27	**Approximate annual operating budget**	*What is your total operating cost for the most recently completed fiscal year?*	$25,000 +3 salaries and benefits	$12,000	$8,300	$6000 In 2025, $1000 one-time grant from HR for 30th anniversary celebration	$10,000	48,783	16,000	$40,000	$12,000	ca. $10,000 plus salary for part time person	$60,000	$12,000	$17,000		$50k	$120,000 plus salary and benefits for 3 FTE (2.5 FTE covered by UW, .5 by UWRA)	$45,000
28	**URL (added 2023)**	*What is your association's website URL?*	emrc.ucla.edu	http://www.suaa-ui.org	https://sura.shehost.iu.edu/	http://uira.org.uiowa.edu/	https://blog.umd.edu/umdrfa/	https://umra.hr.umich.edu	http://www.retirees.msu.edu/	https://umra.umn.edu/	http://emeriti.unl.edu/	https://emeriti.northwestern.edu/	https://osura.alumni.osu.edu/	http://www.PSURA.org	http://www.purdue.edu/retirees/committees/index.html	https://emeriti.rutgers.edu/retirees/home	https://emeriti.usc.edu/	retirees.uw.edu	UWRAmadison.org
29	**Committees**	*What committees does your association have?*	Programs, Membership, Hospitality Archives, Volunteerism, Treasurer (Finance), Webmaster (IT) Nominating, Art Committee Newsletter Emeriti Welfare Awards Book Exchange, Retiree Activity Survey, Travel, Campus Relations Interest Groups	Executive Committee shall designate standing committees for the activities of the Chapter. May include: Legislative, Communications, Membership, Newsletter, Program, Benefits, Audit	"9 person board with 4 officers: President, Vice President, Treasurer, Secretary Cmte chairs ex-officio on Board Try to balance retired faculty & staff" Historian, Program, Retiree Benefits Liaison, Newsletter, Hospitality, Membership Database, United Way Liaison"	Standing Committees: Program, Membership Budget, Nominating, Awards, Newsletter Editor, UIRA webmaster	Steering Committee , Program Committee	Travel, Alumni relations, committee on the economic and social well-being of the faculty, alumni relations, advisory committee on recreational sports, senate assembly, volunteer opportunities committee, program	**Standing Cmtes:** Audit, Awards, Budget & Finance, Communications (newsletter, e-notice e-mail editor website & FB operations), Information Technology, Nominating, Program, Scholarship **Special Assignments:** Photographer, Faculty Emeriti Assoc. Rep, Retiree Volunteer Coordinator, United Way, Interest Grp Coordinator, Human Resources Liaison, Employee Assistance Program Advisory Committee	Program, Membership, Communication & Outreach (newsletter, webmaster, FB), Professional Development Grants for Retirees, UMRA Cares, Nominating, Organizational Continuity	Awards, Benefits, Bylaws and Policy, Campus Engagement, Digital Communications, Educational Activities, Membership, Oral History Project, Programs, Publications, Scholarships, Social Events, Sponsorships, Strategic Plan, BTRA 2028	Nominating, Newsletter Editorial Board	Standing Committees: Benefits, Budget/Finance, Bylaws, Conference Planning, Communications/ Newsletter, Cultural Arts, Friendship, Membership, Social, Travel	Publicity , Communications, Membership (directory), Programs, Retiree Assistance Fund, History & Archives, Volunteerism, Friendship, University Relations Special Committees: Audit, Constitution and Bylaws, Nominating committee, Ad hoc Cmtes as needed	Benefits, Campus & Community, Communications, Finance, Hospitality, Kickoff Luncheon, Media Communications, Program, PURA Annual Spring Conference, Student Scholarship, Trips and Tours https://www.purdue.edu/retirees/committees/index.html	Travel	Standing Committees: Executive; Program Planning; Legislation & Benefits; Social Justice, Equity & Inclusion; Scholarships & Fellowships; Financial Review; Nominations	Standing Committees: Bylaws, Finance, Nominations Operational: Audit, Business Office & Operations Team, The Silver (newsletter)	Electronic Technology, Financial Matters in Retirement, Luncheons & Receptions, Membership, Partnership & Engagement, Retirement Opportunities, Travel Standing Committees: Bylaws, Finance, Nominations
30	**Board Structure**	*What is our board structure? Please list specific positions*	President-elect, President, Past President, Secretary, Treasurer, Committee Chairs	Executive Committee of 12 members, four of whom are elected each year for three-year terms. President, Vice President, and Secretary are elected each year for one-year terms from the members of the Executive Committee.	9 person board with 4 officers: President, Vice President, Treasurer, Secretary	Officers: President, Pres-Elect, Past President, Secretary, Treasurer and 6 Directors at Large; Newsletter Editor, UIRA webmaster	9 members of the Steering Comm (Chair, Vice Chair, Past Chair, Treasurer, Newsletter Editor, Chair of Committees)	15 Board members with 4 officers, President, Vice-President, Secretary, Treasurer Also have a newsletter editor and a digital media advisor, plus we now have a Governance/Executive Committee	President, Vice President, Past President, Secretary, Treasurer, Office Manager, 4 member-at-large	President, President-election, secretary, treasurer, University Retirees Volunteer Center chair, past presidents (for up to three years) , up to twelve board members with 3 year terms, two terms max	President, Past-President, Vice President/Programs, Secretary, Treasurer, Membership, Awards, Benefits, Bylaws and Policy, Campus Engagement, Digital Communication, Educational Activities, Membership, Oral History Project, Programs, Publications, Scholarships, Social Events, Sponsorships, Strategic Planning, BTRA 2028	President, VP/PE. Secretary, Treasurer, Immediate Past President, 6 Councilors, Faculty Senate Rep, Provost Office Rep	President, Vice President/Pres-Elect, Secretary, Treasurer, Historian, Past President, 6 Members at Large, Chairperson from each of 10 Standing Committees, Special Interest Group Coordinator	President, President-Elect, Secretary, Treasurer, Past President, Members-at-Large, Comte Chairs	President-elect, President, Past President, Secretary, Treasurer, Committee Chairs		We have two directors with two boards; Faculty and Staff Retirement Associations.	12 member board which includes President and 2 Vice Presidents. Treasurer and Secretary may be part of the 12 or in addition depending on circumstance. Immediate Past President serves on Executive Committee but is not a voting member of the board. UWRA Executive Director and Vice President for Alumni & Stakeholder Engagement are ex officio, and not counted in the 12	President, President-Elect, Past President, Secretary, Treasurer, 9 at-large directors (representing faculty, academic staff, university staff)
31	**Do you have Shared Interest Groups? How many? Please list them.**	*Do you have shared interest group events, such as book clubs, walking or biking groups, photo club, etc? Please list.*	Book Clubs	No	no	Hiking; Writing	No - but about to start	yes, 10 UMRA Reads, Walks, Hikes, Bikes, Kayaks, Community Service, Mah Jong, Gaming, Travel discussion, Golfs	Yes	Armchair Traveler, 2 Book Clubs, Family History, Financial and Legal Issues, Hiking Club, Photo Club, Morris campus	OLLI - developing more	In past, but not currently.	Special Interest Groups: Book Club, Bridge Group, Craft Group, Dinner Series, Health & Wellness, Photo Society, Walking/Hiking Group, Creative Writing	No but are planning to develop some	no	armchair travel	Book Club; Art Makers; Gardening, Bridge; Coffee & Conversation; Husky Sports Fans; Birding	no, but there is some interest
32	**Updated with 2025 info**		yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	yes	n/a	yes	yes	yes
33																			
34	**Maryland & Rutgers joined BTRA 2023**																		
35	**Washington, UCLA and USC joined the BTRA 1/30/25**																		
36																			
37	**Latest update 7/14/25**																		