

# UMKC Retirees Association Newsletter – November 2013

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## Message from the Chancellor

By Leo E. Morton

As we wrap up our 80<sup>th</sup> anniversary year, I am pleased to share with you the good news of UMKC. Indeed, as we celebrate our university's birthday, we do so in the midst of much excitement and momentum.

UMKC's enrollment of more than 16,000 students is up almost 11 percent since 2007. The physical campus is growing as well. Two new building projects — the Henry W. Bloch Executive Hall for Entrepreneurship and Innovation and the Miller Nichols Library classroom building addition — opened this fall.

The state-of-the-art Executive Hall for Entrepreneurship and Innovation, built with a \$32 million gift from Henry Bloch, stands adjacent to the current Bloch School building and houses graduate, executive and entrepreneurship programs. BNIM Architects designed the new building to maximize "experiential learning." Tables and chairs in the fully wired classrooms are on wheels, allowing students to roll easily into groups for collaboration, while design, behavioral, prototyping, finance and innovation labs offer spaces for active learning.

The new Miller Nichols Learning Center has a dramatic, south-facing glass lobby linking the \$18 million addition to the Miller Nichols Library. Inside, the Center houses a combined 400-seat lecture hall and two 120-seat classrooms, allowing UMKC to accommodate a 23 percent increase in enrollment. The addition also includes the 350-seat Jeannette Nichols Forum auditorium designed to accommodate lectures and other events. These two projects are linchpins to meeting our enrollment growth goal of 20,000 students by 2020.

More expansion is planned:

### UMKCRA 2013 Calendar

#### Watch for More Details!

**December 1** – Recognition Award Nominations Deadline

**December 7** – 11:00 to 1:00 – Holiday Reception and Luncheon – Pierson Auditorium

**February 5, 2014** – UMKCRA Board Meeting – Location to be determined

**April, 2014** – UMKCRA Spring Luncheon – Pierson Auditorium

**May 7, 2014** – UMKCRA Board Meeting – Location to be determined

#### Other program suggestions?

Please contact John Ditto or Marj Finley.

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- The Ewing Marion Kauffman Foundation has pledged \$5 million toward a new \$14.8 million Free Enterprise Center on the site of a vacant building located at 215 Volker Blvd. The Free Enterprise Center will assist in the development of prototype devices, manufacturing processes and end products, and will provide additional space for the university's School of Computing and Engineering and the Henry W. Bloch School of Management.
- Construction is under way on the first residence hall for students on Hospital Hill. The new 254-bed student apartment complex is slated for completion in time for the 2014 fall semester, and will provide housing for students at the schools of Medicine, Dentistry, Nursing and Health Studies and Pharmacy.
- In June, the university has received a \$20 million challenge grant toward the creation of a new arts campus in downtown Kansas City. The grant is the first phase of a proposed expansive multi-decade plan to move the university's renowned Conservatory of Music and Dance to a location in the Crossroads District. Subsequent phases would move other university-based arts programs to the site.

The university is growing in other ways as well. UMKC's capital campaign, the seven-year, \$250 million "Campaign for UMKC," has already received more than \$177 million in gifts. The campaign, launched in 2009, will provide scholarships, fund endowed faculty positions and develop and expand our world-class programs.

Excitement around the 80<sup>th</sup> anniversary and the growth of UMKC were marked this fall during a series of great events.

In late August, about 200 volunteers serving on our alumni and constituent boards attended the annual Leadership Summit Breakfast. The leaders gathered to receive updates on the state of the university.

And Sept. 28 to Oct. 5, alumni from all over the country gathered for Founders' Week to help the university commemorate its 80th anniversary and celebrate its future. The week kicked off with *The Planets* concert at the Kauffman Center for the Performing Arts, which was attended by nearly 1,400 people. The week also included a 5K Regalia Run, a dinner attended by five UMKC chancellors past and present, and Commemoration Day, highlighted by an historic re-signing of the original university charter.

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Other events that week included master classes taught by four of our esteemed alumni and a cornerstone celebration for the new student housing on Hospital Hill.

As you can see, UMKC continues to grow in a myriad of ways in its 80<sup>th</sup> year. It is, indeed, a wonderful time to be at our great university, and we look forward to the progress and growth to come.

Please stay in touch with us and let us hear from you. We value your input and opinion as we move into the next phase of our growth, and thank you for all you continue to do as retirees to support the campus.

### **Greetings, Fellow UMKC Retirees!**

By Pat Hovis-French, 2013 UMKCRA President

This time last year I was also writing an article for the UMKCRA Newsletter and talking about my vision for our group. You might recall that my vision had three prongs:

- Sharing what we've learned
- Staying connected and up-to-date
- Maintaining our campus relationships

As 2013 draws to a close and I prepare to turn the reins of UMKCRA over to the able hands of Mary Anne Morgenegg in December, it seems appropriate to reflect on what the year has wrought.

- Sharing what we've learned: Our quarterly newsletters have included information for all retirees (and pre-retirees) about legislative issues, upcoming events, and stories from retirees about "life after UMKC." The Emeritus College is now a reality – with a Dean (Dr. Bibie Chronwall), a Board, and a place. It is anticipated that by next March, the Emeritus College area in the Miller Nichols Library will be ready for occupancy! UMKCRA Board members have begun conversations with several community-based groups to explore areas where we might work together to provide programs and share our expertise.
- Staying connected and up-to-date: Our Communications Committee continues to brainstorm ways to make our new web-page more vibrant and interactive, as well as ways we can provide training to help retirees take full advantages of the available options. Our Benefits Committee provides timely information about benefits for retirees in our newsletters and has invited Kelley Stuck, UM System Associate Vice President for Total

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Rewards to campus on November 12 to speak to all retirees and pre-retirees about the current status of and any proposed changes to the retirees' benefits. Our ad hoc "By-law and Constitution Review Committee," chaired by Merton Shatzkin went through those documents word by word and has updated versions ready for your consideration and action at our next annual meeting.

- **Maintaining our campus relationships:** Last, but by no means least, our Program Committee has done an extraordinary job this year! Beginning with our annual Spring Luncheon Meeting in April, when our 2013 UMKCRA Recognition Award was presented to Dr. Richard Gentile and the audience was treated to an inspiring program about the Conservatory's Musical Bridges (including a performance by the budding musicians in the program), and continuing through the year. Retirees had the option of attending a lecture by Dr. Gentile and touring the Geosciences Museum in August, gathering for a reception in the Dean's Gallery of the Miller Nichols Library to renew acquaintances and view memorabilia from the 80 years of the institution's history, sharing breakfast with other UMKCRA members and listening to Bruce Bubacz delight the audience with humorous tales from his 40+ year career at UMKC, and participating in the historic re-signing of the campus charter on Founders Day, October 1. Attendees to the Founders Day events could also tour the new Miller Nichols Learning Center addition to the Library and the newest building on campus, the Henry W. Bloch Executive Hall for Entrepreneurship and Innovation. On November 1, retirees were treated to performances by our 2012 UMKCRA Recognition Award recipient, Dr. Dan Jaffe, and his wife JoAnn, at a reception at Diastole. The year's events will be topped off with our annual UMKCRA Holiday Lunch on December 7. If you haven't made your reservation yet, you shouldn't miss this affair. The December lunch is not only a time to visit with old friends and enjoy the program, but it is also our Annual Association Meeting when UMKCRA members have the opportunity to vote on the proposed slate of officers for 2014, and act on the proposed changes to the UMKCRA Constitution and By-laws. **(See the RSVP information elsewhere in this newsletter.)**

It has been a privilege and pleasure to serve as your UMKCRA President this year. Having such an amazing group of Board Members, Committee Chairs, and Committee members working diligently at their tasks, made

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this the easiest job I've ever had!!! My heartfelt thanks go out to each and every one of them.

### **Looking to 2014**

By Mary Anne Morgenegg, UMKCRA 2014 President

Thanks to Pat Hovis-French for all her hard work in the past year. She made the transition into my new role easier and less stressful.

Since retiring, I've seen four people fulfill the role of UMKCRA president. Nancy Mills, Marvin Querry, Denny Schemmel, and finally, Pat, have all contributed to the organization. These are big shoes to fill. These leaders were successful because they were supported by the active membership and had the ongoing support of the Advancement Office and the Chancellor's Office.

To present and former Board members: you are an impressive bunch. I hope we will continue to grow, both as an organization, and as an asset to both our members and the university community at large. One of the goals of my presidency will be to find new ways to educate and recruit current employees who are approaching retirement about UMKCRA and its mission.

There are other relevant developments taking place that will be important to UMKCRA in the coming years. On Thursday, October 24<sup>th</sup>, several Board members and I attended a reception hosted by the UMKC College of Arts & Sciences Center on Aging Studies. In addition to UMKCRA, representatives from the Emeritus College, SPARK, and Continuing Education were present to describe what they do and how they operate to serve UMKC's Seniors Community. Getting everyone together will lead, hopefully, to future opportunities for collaboration, volunteer opportunities, and expanding services for our members.

If you have anything you wish to suggest or comment on, please feel free to contact me: Mary Anne Morgenegg; 816-363-4099; [morgeneggm@yahoo.com](mailto:morgeneggm@yahoo.com). Thank you.

*Editor's Note: The following is the report supplied to all who attended the meeting in Columbia by Nan Erickson, University Liaison with Retiree Organizations. I reprint it to give our readers a sense of how far reaching and informative these sessions can be.*

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## **UM Retirees Association Leaders Fall Meeting**

October 16, 2013

**Attendees:** Elizabeth Cummins-Vonalt, Sharon Davis, Dave Dearth, Nan Erickson, David Ganz, David Garin, Patricia Hovis-French, Ken Hutchinson, Jim Koller, Ron MacQuarrie, Mary Anne Morgenegg, Shirley Patterson, Rose Porter, Bob Stewart, Fred Wilke, Earl Wilson, and guest, Melanie Barger

**Leaders' Discussions** – The UM Retirees Association Leadership Directory was distributed. Leaders present made necessary corrections/additions.

Report from Rose Porter, retiree representative of all four campuses on ad hoc task force reviewing Total Rewards program: Meetings are held twice a month. Main focus to date has been to educate members about the current program—its problems, costs, and options currently available to retirees and employees. Recommendations by the task force for changes/modifications of the current benefits offered are due to the Board of Curators April, 2014.

### Highlights from the Retiree Groups' Updates:

Columbia—Reviewed planned fall activities; reported retiree gifts to MU. All tax issues resolved and non-for-profit organization status [501(c)(4)] for MURA obtained, resulting in sales tax exemption and non-profit mail rates. Currently working on list serve challenges.

Kansas City—Reviewed the 80<sup>th</sup> anniversary celebration activities on campus. Kelley Stuck will visit the campus on November 12 to address any concerns from retirees about their benefits. Currently working on mailing issue challenges (trying to reach all retirees). The Emeritus College (EC) Dean and the Board are meeting to establish the by-laws, and the EC space is being renovated and will be ready for use by March 1, 2014.

Rolla—Current stats for group: 150 members, \$5 dues, one newsletter published a year, one luncheon with program per month, and member directory printed every other year (paid for by Chancellor). Officers serve two-year terms. Group involved in two projects this year: (1)

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Reconstructing the history of the organization including past presidents, and (2) Annual work with United Way campaign.

St. Louis—Reviewed scheduled activities celebrating the Jubilee year. Annual activities include a holiday luncheon and a business luncheon in June during which officers are elected. Ongoing discussion about term limits; a constitutional amendment concerning this issue will be proposed shortly to the membership. Currently officers serve two years, with a limit of three terms.

Melanie Barger, Manager of Constituency Communications, UM System: Melanie reviewed her efforts to keep all UM retirees informed and connected. She currently has 8,445 e-mail addresses from retirees from all four campuses and the University Health Sciences Center. She reviewed the e-newsletter's timeline, needed content, and deadlines for submission of content. Please see the attached file from Melanie with specific requests for information from the president of each campus retiree group. This information needs to be sent to Melanie ASAP.

**President Wolfe** – President Wolfe's remarks focused on the following four points:

- (1) Executive searches—Dr. Henry (Hank) Foley has been appointed as the Executive Vice President for Academic Affairs. His expertise is in working with local and federal governments and businesses to share ideas and projects. His focus will be to maximize our license revenue by modifying some of the guidelines and procedures to better attract great innovators. The MU Chancellor's search is ongoing and on schedule to naming a person to fill that position by November 15.
- (2) Strategic planning—Monies have been allocated according to the UM System's established criteria and the strategic plans developed by each campus.
- (3) HB253—The good news is that the Governor's veto was upheld. Every dollar cut is a two-dollar cut because of the federal match. President Wolfe believes priorities must be set, and tax policies developed to support those priorities. He requested that we ask the question: What does a tax decrease do to the services that we currently receive and enjoy?

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(4) Show Me Value campaign and total communication plan—President Wolfe started this campaign last year by spending one day in each of four communities (Moberly, St. Joseph, Lebanon, and Farmington). In the morning he met with 7<sup>th</sup>, 8<sup>th</sup>, and 9<sup>th</sup> graders to talk about the value of education. A letter was given to each student to take home to their parents that emphasized the importance of higher education. Then he met with each community's mayor, economic development leader, and the superintendent of schools. The remainder of each day was spent visiting various businesses. He plans to continue this campaign this year by visiting Webb City, Jackson, a small school near Jefferson City, and a small community in Northeast Missouri. Also, he participates in many radio interviews (free media). He asked us to check the Advancing Missouri website.

Nan Erickson invited the presidents of each campus retiree group to share important information about their group with the President and discuss with him any questions/issues that their members might have.

**Renatta Gallup**, Director, Pension and Deferred Compensation – Betsy Rodriguez and Kelley Stuck were unable to attend our meeting due to other commitments. However, Renetta updated us about current retiree benefits via a Power Point presentation.

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*The UMKCRA Newsletter is edited by Dale Neuman. Please contact Dale at 816-942-9091, 816-235-2787, neumandale@hotmail.com or neumand@umkc.edu with questions or comments about the newsletter. Rita Messina has joined the newsletter team as an assistant to the editor. Kim Rudolph of the Alumni and Constituent Relations Office manages design, layout and production.*

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### **UM System to Produce Email-Based Newsletter for All Retirees** By Dale Neuman, UMKCRA Newsletter Editor

The President's Office wants to assist UM Retiree Organizations in their outreach and recruitment efforts and is establishing system-generated email-based newsletters for each campus that will have both system-wide common content and campus-specific content. The plan is for it to be a quarterly, appearing in late January, late April, late July and late October, and sent to those retirees who have emails on file with the system. It will



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include many of the same types of features and stories that I have tried to capture and print in the UMKCRA newsletter but with the added benefit of having more frequent and timely coverage of system information, messages from the President, updates from HR and other topics. And it will go to all UMKC Retirees (who have valid email addresses) four times a year instead of just once a year at year's end as is the case in UMKCRA now since we do not have the budget to print and mail to all UMKC Retirees each quarter. I recognize that many do not have email addresses but this might be a good time to get one from some of the free ISP sources like Hotmail and others if you do not already have one.

UMKCRA President Pat Hovis-French has asked me to serve as the contact person with the system office on this new development and I have agreed to do so. It may well mean that you will have to contact me with ideas or suggestions as well as questions or issues that might arise as this "new" communications enterprise unfolds. I will give you my phone numbers and email addresses right now so that we can have a running start. My home phone is 816-942-9091.

### **UMKCRA Nominations Committee Report**

By Denny Schemmel, Chair

The Nominations Committee has not met since the last Board meeting on August 14, 2013, when it submitted the list of candidates for Board approval. The slate of candidates for election was unanimously approved by the Board at that time. Brief bios are included below to help introduce the newest members. Since the by-laws call for the presentation of this slate at least 21 days prior to the December election, we wanted to avoid the possibility of the November Newsletter being late and missing this 21 day deadline, so the names were presented at the August 2013 meeting.

Here are the nominees: Vice-President and President-Elect (2014) **Lora Lacey-Haun**; Treasurer (for 2014-2015) **Ted Sheldon**; Board Members for a Three Year Term (2014-2017), **Brenda Fasken**, **Bob Piepho** and **Merton Shatzkin**.

**Brenda Fasken** arrived on the UMKC campus in 1968 as a student in the Conservatory of Music and finished her student years in 1976 with a degree in Sociology. She retired from the University in January 2013 after serving 39+ years as a full time employee. During that time she spent 28 years in the School of Education, moving from Secretary to Manager of Business & Fiscal Operations; 3 years with Campus Facilities as Manager

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of Business & Fiscal Operations, 8 years as a Project Administrator in Administrative Affairs. Currently, she is still on campus part-time working for Parking Operations.

**Lora Lacey-Haun** assumed the position of Dean for the School of Nursing at UMKC in February 2004. Prior she served as the Associate Dean for Graduate Studies at UMKC from 2002 to 2004 and the Associate Dean for Research and Graduate Studies at the School of Nursing from 1993 to 2002. She received her bachelor and masters degrees in nursing from the University of Alabama at Birmingham (UAB) in 1977 and 1980, respectively. She received her doctorate from UMKC in Curriculum and Instruction/Adult Education in 1988. She has been on faculty at UMKC School of Nursing since August 1981. Since becoming the Dean in 2004, she has worked with faculty to develop the school's program of research in the area of health care disparities and health needs of the underserved, most of which is community based. In 2010, Dr. Lacey-Haun was recognized by the UAB School of Nursing as one of 50 Visionary Alumni in celebration of the School's 50<sup>th</sup> anniversary. In February of 2013, she was recognized in Ingram's Magazine as one of 9 Icons in Education from Missouri and Kansas.

**Bob Piepho** came to UMKC as Dean of the School of Pharmacy in 1986 and served in that position through July, 2010. He then returned to the faculty and retired in March, 2012. He received numerous awards for teaching as well as being recognized as Teacher of the Year by the Class of 2008. During his time as Dean, the School transitioned from the B.S. Pharmacy Program to the Doctor of Pharmacy degree, grew research funding from \$250,000 to over \$1,000,000 per year, developed a Satellite Doctor of Pharmacy program with UM-Columbia and received numerous community service awards. He has served on many UMKC Task Forces, was instrumental in the formation of the President's Academic Leadership Institute and served on its Board for 12 years. He also has been involved with the American Heart Association, Truman Medical Center, the Parkinson's Foundation of the Heartland, and is past Chair of the Boards of Premier Life and John Knox Village.

### **SRO for Retiree Benefits Meeting on November 12**

By Dale Neuman

Kelley Stuck, UM Associate VP for Total Rewards, came to UMKC to discuss the health care options available to UMKC Retirees under UM

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plans for retirees. In addition to presenting an informative power point that highlighted differences in the options and noted slight premium increases in two of the three as well as the current financial condition of the Retirement Plan, Ms. Stuck discussed the impact that the Affordable Care Act has had as certain mandates now had to be covered by UM plans. She also addressed a number of questions from those in attendance that ranged from the difference between a secondary and a supplemental plan as they relate to Medicare to how is the Retirement Trust Fund managed. She urged those present to take advantage of the UM Benefits website that has some educational videos designed specifically to address Retiree questions. When one attendee politely complained that upon having difficulties with the website and calling the Retiree Benefits Office he was told to go back to the website, he felt that this was not much help. Kelley apologized and indicated that they are working to improve the site but that he should feel free to again call and insist that the person on the phone walk him through the details of the issue on which he needed assistance. He was invited to contact her if he still needed assistance. Here is the UM Retiree Benefits site: [umsystem.edu/totalrewards/retirement](http://umsystem.edu/totalrewards/retirement). Here is the phone: 573-888-2146. And, for users of email, the e-address is [retirement@umsystem.edu](mailto:retirement@umsystem.edu)

One benefit that she mentioned that many were not aware of is that the UM had arranged for hearing aid discounts under the Vision Plan and she told us that those discounts are available for those who are not enrolled in the Vision Plan as well. Please check the plan information for more details.

The meeting, arranged by the UMKCRA Benefits Committee and moderated by committee chair Ron MacQuarrie, was attended by more than 60 people.

### **Proposed Amendments to the Constitution and By-Laws of UMKCRA Passed by Board**

*Editor's Note: Proposed changes to the UMKCRA Constitution and By-Laws were approved by the Board on May 1, 2013, and now must be voted on by the general membership at the December, 2013, business meeting and luncheon. The proposed changes were published in full in the August newsletter to meet the 21 day advance notice requirement for items on the business agenda. Those changes dealing with membership and committees mostly tidy up the language for clarity and consistency*

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*purposes. Those changes dealing with the duties of the Treasurer are to accommodate the fact that all bookkeeping activities associated with UMKCRA accounts and all records are now kept by UMKC. The proposal on funds distribution should dissolution of UMKCRA occur stipulates which scholarship fund or funds are to receive them and reserves a role for the UMKCRA Board in making that decision. Copies with the language of the specific changes will be available at the Business Meeting on December 7 for review. They are also available in the August UMKCRA Newsletter at [umkcra.umkc.edu](http://umkcra.umkc.edu) and click on news and then recent newsletters, pages 7 through 11.*

### **UMKCRA Scholarship Developments**

By Dale Neuman

Over the past several years the UMKCRA Board has discussed funding some sort of scholarship in its name as a way to utilize monies that had accumulated over the years in a CD that UMKCRA held, which is now part of the UMKCRA investment account. More recently, as part of the UMKCRA commitment to the UMKC Capital Campaign, the Board pledged to match up to a total of \$5,000 other donations to a UMKCRA Scholarship. From several reports, it is clear that those matching donations are starting to occur and the Board is now looking at what kind of scholarship the funds should support. Board Member Linda Edwards undertook the task of doing research on this and reported to the Board at the November meeting on her findings.

Linda discovered that, while UMKC offers both an undergraduate minor in Gerontology and a graduate certificate in Gerontology, there are no scholarships specifically designated for students in these programs and recommended that the Board consider creating one to fill this void given the connection between being retired and gerontology. Moreover, since the students in these programs come from at least eight different schools at UMKC and the faculty represent more than 18 disciplines in them, this would allow the scholarship to serve the entire campus and not just a specific school. She has also made suggestions for the manner of application and the method of awarding such a scholarship and the board has charged her with working out those details as it awaits information on where the fund-raising total stands. (*Editor's Note: Current UM rules require that \$25,000 be raised before an endowed scholarship can be created and named.*) Look for more information in coming months. And if you wish to donate, contact the UMKC Advancement Office.

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*Editor's Note Regarding Committee Reports. The items published may be edited or abridged. The full reports are available as part of the minutes in the UMKCRA archives.*

### **UMKC Retirees Campaign Update**

The UMKC Foundation has provided updates as of November 2013 of the progress on the UMKCRA campaign to date. So far, \$2,500 has been raised toward the UMKC Retirees Association Scholarship. Donors have provided \$77,925 in support of the Emeritus College. The Foundation and UMKCRA continue to seek support for those projects as well as an operating endowment for the Retirees Association.

To date, retirees have contributed more than \$3.2 million to the overall campaign for UMKC.

### **Communications Committee Report**

Dale Neuman, Chair

The Communications Committee did not meet as a group but exchanged emails related to issues that exist related to the UMKCRA website. These are mostly related to our inability to keep items posted that are current and therefore more helpful and informative for the members (and others who may visit the site) as news and less confusing than when they are out-of-date, sometimes by as much as a year. We may need to visit with those in charge of the Alumni page to see if they would authorize and train someone in UMKCRA to be able to make the changes.

We may also need to reconsider how we can best use the website as maybe some of what we are putting there is not the best use of the site and the time of those who must maintain it.

*(Editor's note: At the Board meeting, it was suggested that we poll those attending the luncheon to see how many have gone to our website as well as how many use and would prefer to use social media like Facebook instead of the UMKCRA website. We will have that opportunity available. For those who do not plan to attend the luncheon and want to comment on this, you can contact me at [Neumand@umkc.edu](mailto:Neumand@umkc.edu))*

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## UMKCRA RECOGNITIONS COMMITTEE

By Denny Schemmel, Chair

The Recognitions Committee met formally just prior to the November Board meeting to consider the candidacy and application materials already received for a Recognition Award to a faculty member who has continued his scholarly efforts during retirement – a period of over 20 years. The Board approved the recommendation of the Committee.

The Committee was also informed that application materials and appropriate letters of reference are being prepared for a prominent staff retiree. The submission deadline for these materials is the first Monday of December. The Committee plans to review these materials at a later point and, if they find the application in order, will present this candidate for the staff Recognition Award for approval to the Board at the first Board meeting in 2014, giving ample time for the award creation and presentation to both winners at the Spring Luncheon.

## UMKCRA Volunteering Committee

By Reaner Shannon, Chair

Volunteer Opportunity:

This is the seventh year for the “**Home for the Holidays**” program.

The Alumni Governing Board is partnering with the UMKC Retirees Association to again offer opportunities for UMKC international students to have a meal in an American home with alumni, retirees, faculty and staff during the holiday season.

The program dates are any time between November 11, 2013 and January 11, 2014. You can choose preferred dates, times of day and the number of students you wish to host.

The deadline for signing up to host or invite students into your home for a meal is Friday, November 8, 2013. Please call 816-235-1563 with any questions or for more details visit [www.umkcalumni.com](http://www.umkcalumni.com) and click on Events.

*(Editor’s Note: While I realize that the due date for participation will be passed by the time you receive this issue, I feel that the idea is worth publicizing so that those who wish may plan for it next year.)*

## **UMKCRA Membership Committee**

By Leo Sweeney, Co-chair

The Membership Committee did not meet since the last Board meeting as it awaited the outcomes of the Task Force set up at the last Board meeting. *(Editor's Note: This task force is reviewing the UMKCRA membership philosophy, categories and dues system.)*

In the meantime, plans are under way to recruit the recent faculty and staff retirees.

## **UMKCRA Treasurer's Report**

By Ted Sheldon, Treasurer, November 6, 2013

The UMKC Retirees Association concluded the third quarter of 2013 in good financial condition (see Table 1 below). On September 30, 2013 the Association held total assets of \$14,147.71. This amount included \$8,629.48 in the Investment Account and \$5,518.23 in the Operating Account. One year earlier, on September 30, 2012, total assets amounted to \$14,030.85, including \$7,728.98 in the Investment Account and \$6,301.87 in the Operating Account.

### **RETIRES INVESTMENT ACCOUNT**

Funds held in the Retirees Investment Account increase and decrease in value as the investments held by the fund change in value. Funds in the Investment Account are managed as part of the University's investment pools in accord with the policies and goals set for those pools. During the first nine months of 2013, the balance in the Investment Account has increased by \$504.47. This amounts to a return of 6.2 percent thus far this year, and an annualized rate of return of 8.3 percent. This is a significant improvement compared to the Capitol Federal CD that held this investment in earlier years.

### **OPERATING ACCOUNT (See Table 2 Below)**

The balance in the Operating Account amounted to \$5,518.23 on September 30, 2013, \$783.64 less than on the same date in 2012. The first three quarters of 2013 saw income of \$6,096.59; expenses amounted to \$8,067.63. As Table 2 shows, membership dues are down more than \$3,000 compared to amounts received last year at this time. Annual dues income was only 15 percent of the budgeted amount, and life dues income

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was somewhat higher at 40 percent of the budgeted amount. Compensating for these low income figures was the generally low level of expenses paid out, only \$5,567.63 when the \$2,500 contribution to the scholarship fund is removed.

**TABLE 1: Balance Sheet - As of 9/30/2013**

<b>Account</b>	<b>Sept 30 2013</b>
	<b>Balance</b>
<b>ASSETS</b>	
Cash and Bank Accounts	
UMKCRA Investment Acct	\$ 8,629.48
UMKCRA Operating Acct	5,518.23
TOTAL Cash and Bank Accounts	\$ 14,147.71
<b>TOTAL ASSETS</b>	<b>\$ 14,147.71</b>
<b>LIABILITIES &amp; EQUITY</b>	
<b>LIABILITIES</b>	\$ -
<b>EQUITY</b>	\$ 14,147.71
<b>TOTAL LIABILITIES &amp; EQUITY</b>	<b>\$ 14,147.71</b>

A Transaction report detailing all income and expense transactions on the operating account is available on request by contacting the Treasurer at sheldontp@gmail.com.

### SCHOLARSHIP FUND

The Board pledged a contribution to the Scholarship Fund of \$5,000. Earlier this year, the Board authorized the transfer of \$2,500 to the Fund from the Operating Account, and that transfer took place in September 2013. The second transfer of \$2,500 fulfilling the pledge remains to be made.

This report does not include scholarship funds sponsored by the UMKC Retirees Association and administered by UMKC.



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<b>TABLE 2:</b>			
<b>Income/Expense Comparison by Category</b>			
<b>2013 Compared to 2012 Through September 30</b>			
<b>Category</b>	<b>2012</b>	<b>2013</b>	<b>Amount</b>
	<b>Jan 1 thru Sep 30</b>	<b>Jan 1 thru Sep 30</b>	<b>Difference</b>
<b>INCOME</b>			
Chancellor	\$ 3,400.00	\$ 3,400.00	\$ -
Decline In Value	(362.66)	(94.33)	268.33
Events-Receipts & Fees	1,264.00	1,104.00	(160.00)
Gift Income	25.00	-	(25.00)
Interest Inc	494.56	598.80	104.24
Member Dues Paid-Annual	1,320.00	210.00	(1,110.00)
Member Dues Paid-Life	2,500.00	600.00	(1,900.00)
Other Inc	-	278.12	278.12
Return of Funds	63.67	-	(63.67)
<b>TOTAL INCOME</b>	<b>\$ 8,704.57</b>	<b>\$ 6,096.59</b>	<b>\$ (2,607.98)</b>
<b>EXPENSES</b>			
Dues and Subscriptions	\$ -	\$ 133.34	\$ (133.34)
Events-Facility Charges	-	265.00	(265.00)
Meals & Entertainment	2,600.70	3,560.94	(960.24)
Office Supplies & Expenses	1,272.00	47.66	1,224.34
Postage & Delivery	1,119.57	335.50	784.07
Printing and Reproduction	1,086.05	1,225.19	(139.14)
Scholarship Fund	-	2,500.00	(2,500.00)
Travel	298.73	-	298.73
<b>TOTAL EXPENSES</b>	<b>\$ 6,377.05</b>	<b>\$ 8,067.63</b>	<b>\$ (1,690.58)</b>
<b>OVERALL TOTAL</b>	<b>2,327.52</b>	<b>-1,971.04</b>	<b>-4,298.56</b>

# UMKC Retirees Association Newsletter – November 2013

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*Editor's Note:*

*Since this issue of the UMKCRA Newsletter is going to both members of UMKCRA and to all other UMKC Retirees, I urge non-members to consider joining UMKCRA and adding your talents and interests to our organization. The cost is only \$10 to try us out for a year.*

*I also remind members who chose the annual membership option that your dues are now due since we operate on January to December calendar year basis. If you have forgotten whether you are an annual member or a life member, check your mailing label. An "L" on it indicates life membership.*



## **YES!** I'd like to join or renew my membership in the UMKC Retirees Association

- Renew – Annual Member (\$10 annually)
- New – Annual Member (\$10 annually)
- Join – Pre-Retirement Member (\$10 annually)
- New – Life Member (\$100 one time)

*For definitions of Membership categories see UMKCRA Constitution / By-Laws*

*(Note: To be eligible as a Pre-retirement member, one must be eligible to retire from UMKC and be over age 55.)*

Name \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Phone \_\_\_\_\_

E-Mail \_\_\_\_\_

MasterCard, Visa, Discover or AMEX (Circle One)

Credit Card Number \_\_\_\_\_ Exp Date \_\_\_\_\_

**Signature** \_\_\_\_\_

Or send checks payable to the:

UMKC Retirees Association, 5100 Rockhill Road, AC 300-B, Kansas City, MO 64110-2499  
Questions? Please Call Kim Rudolph at 816-235-1563

**UMKCRA HOLIDAY RECEPTION AND LUNCHEON**

SATURDAY, DECEMBER 7, 2013

11:00 a.m. Reception  
11:30 a.m. Lunch  
12:15 p.m. Business Meeting  
12:30 p.m. Program: Science from the UMKC  
Galaxy Evolution Group

PIERSON AUDITORIUM  
5000 Holmes, Kansas City, MO 64110

\*\*\*\*\*Cut here and mail with payment\*\*\*\*\*

**UMKCRA HOLIDAY RECEPTION AND LUNCHEON**

SATURDAY, DECEMBER 7, 2013

Name(s): \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip code: \_\_\_\_\_

Number Attending \_\_\_\_\_ @ \$16.00 each. Total \$ \_\_\_\_\_

**YES!** I would like vegetarian plate(s) \_\_\_\_\_

Please charge my credit card (*circle one*):

**Master Card Visa Discover AMEX**

Card Number: \_\_\_\_\_ Exp. Date: \_\_\_\_\_

Signature: \_\_\_\_\_

--or--

Send checks payable to the:  
UMKC Retirees Association  
5100 Rockhill Road, AC 300-B  
Kansas City, MO 64110

Please RSVP by Monday, December 2, 2013



UNIVERSITY OF MISSOURI-KANSAS CITY  
Retirees Association  
5100 Rockhill Road  
Kansas City, Missouri 64110-2499

