

Retirement Association

UNIVERSITY OF WISCONSIN-MADISON

2020-21 Report

UWRA Annual Report Chris Kleinhenz, 2020-21 President

From the point of view of public health, 2020-21 was a year unlike any other in the Association's history, due to the restrictions put into place locally, statewide, nationally and internationally because of the covid-19 pandemic. As an organization founded to "promote the interests and welfare of Association members, to facilitate their support of the University of Wisconsin-Madison and the surrounding community and maintain liaison with relevant University and community organizations" (Bylaws, Article 2: Purpose), the UWRA managed to make good on these various missions in 2020-21 despite the disruption caused by the global health crisis, although most of our activities took new and generally untried forms. Given these circumstances, the Association acquitted itself very well in delivering high quality programs for its members and in conducting normal business matters, thanks to the work of our dedicated committees, elected officers, and members of the board of directors. All of these activities – board and committee meetings, a wide range of programs, and the like – were done exclusively via Zoom technology. Therefore, generally speaking, I would say that the year proved to be a great success despite the challenges we faced. We hope that in 2021-22 we will a return to our normal, in-person activities.

Among the activities of 2020-21 we offered our members some thirty Zoom presentations on a wide variety of topics relating to health issues, financial well-being and computer technology, as well as several armchair travelogues and even a virtual hike at Devils Lake State Park. We have also met the challenges posed by virtual breakfasts and have enjoyed reading the redesigned and expanded Sifter. For these many benefits, we are indebted to many individuals who have given and continue to give generously of their time, energy and expertise for the common good. The May 2021 Sifter includes a list of the many members who have worked tirelessly in managing the affairs of the Association and in organizing the many popular and informative programs offered over the past year.

Our collective thanks go to the following individuals for their outstanding service to the Association during this past year:

Sandi Haase, our Executive Director, successfully brought us into the digital world and attends to our many needs with a generosity of spirit and a wealth of knowledge that confirm her sainthood. In conjunction with the Business Office Operations Team (BOOT: Barbara Rust, Larry Winkler, Beth Zemp, Jurgen Patau), Sandi also provides expert management of the Association's website, keeping it up to date and supplied with a wide range of announcements of interest and importance to members, as well as the site of record for our reports and other business activities. Our agreement with Wild Apricot is working very well.

Mary Czynszak-Lyne provided excellent leadership for the Strategic Framework Initiative and continues to play a key role in our Association. Together with Mary the following members of the Strategic Framework Workgroup continue to demonstrate their dedication to the project that will help shape the future directions of the Association. Phase One of the project involved the preparation and distribution of a survey, and we recognize the members of the Survey Team – Sandi

Haase, Karen Holden, Mary Beth Plane, Yao Zhao – who developed the questionnaire and gathered and synthesized the results. In September all members with email accounts (82%) received the survey, and the outstanding response rate of more than 50% gave the working group an extensive list of topics and issues on which action is being taken. Another Team is formulating proposals concerned with the financial health of the Association, and its members are Bob Dye, Sandi Haase, Jurgen Patau, and Mary Czynszak-Lyne. One additional group – consisting of Jerry Kulcinski, Joan Gillman, Laurie Mayberry and Chris Kleinhenz – has defined several possible partnerships with on- and off-campus organizations that may offer some interesting and rewarding volunteer opportunities for our members. For 2021-22 this group will be merged with the Committee of Partnership and Engagement and will thus cease to be part of the Strategic Planning Initiative.

Sheila Leary, the new editor of our newsletter, has redesigned, reformatted, and expanded The Sifter to include several new and well-received features, among which the column on books that members are enjoying ("Book Marks"), coordinated by Laurie Mayberry and on "Reflections" by Mary Bernard Ray. Many thanks go to Deb Lauder who for more than four years coordinated the "Meet the Member" column, and we welcome Crescent Kringle who has assumed this responsibility. Given the impossibility of group travel this year, the Travel Committee initiated a series of well-received "Virtual Travel" pieces to respond to our collective wanderlust.

A deep debt of gratitude goes to all the officers of our Association: Marian Fisher, our Secretary, who captures with singular grace the essence of our meetings; Beth Zemp, our Treasurer, who carefully monitors the finances to keep us more than solvent; and Esther Olson who, as both Board member and President-Elect, has contributed good common sense to our deliberations. Many thanks go to all the members of the Board of Directors who devote so much of their time to keeping the good ship UWRA on an even financial keel and to guiding the affairs of the Association for the benefit of all of our members. Special thanks go to those Board members who are completing their three-year terms: Sue Fischer, Wendy Way, and Karen LaMere. We will benefit from the wisdom of the six continuing Board members: Marcy Doelp, Jack Sorenson, Millard Susman, Tom Broman, Laurie Mayberry, and Jane Dymond (who is also President-Elect). Their dedication and good sense have guided our Association very well.

Much of the work of the Association is done through our committees, and we are greatly indebted to all their chairs and members for their innovative ideas and careful planning of the many and diverse events we have enjoyed over the past year and who have given so generously of their time. These committees (chairs in parentheses) are Electronic Technology (Kathy Christoph, Ann Wallace); Financial Matters (Jack Sorenson, Jurgen Patau); Retirement Opportunities (Sue Fischer, Mary Beth Plane); Travel (Esther Olson, Peggy Daluge); Luncheon (Jane Dymond); Partnerships (Chris Kleinhenz, Tom Broman); and Membership (Bob Dye, Mary Czynszak-Lyne). Their dedication and invaluable contributions to our Association have made possible the many virtual presentations we have enjoyed over the past year, and planning is currently underway for next year's programs and events.

Through the miracles of technology, we have been able to continue our active participation in these programs, but we all hope to be able to return to meeting in person at some point in 2021-22. Given that our virtual presentations this past year reached large audiences, including members who no longer live in the Madison area, we are working on ways to offer future hybrid programs for both inperson and virtual audiences. Because of the impossibility of visiting sites in person, the Travel Committee has sponsored over the last year several virtual tours to a variety of places, but we hope

this temporary solution will be replaced sometime next year with bus travel to interesting places in Wisconsin.

Over this past year our members have continued their generous support of the Association this past year by attending our various events, by suggesting topics for presentations to our committees, by standing with us during this unprecedented pandemic, and by their generous financial contributions. This year the Board of Directors changed the focus of member donations to support only one food pantry — the on-campus Open Seat Pantry – and these donations also include those made by the Association in honor of our speakers and in honor of all our committee volunteers. Thanks to the combined generosity of members and the Association, we collected \$5,155 for the Open Seat Pantry. This is a good example of our continuing partnership with the University.

Finally, in terms of financial support the Association gave \$1,000 as a matching grant to the Madison Public School Foundation and \$1,000 to the Dean of Students Crisis Loan Fund. The support of our members and their generous spirit are much appreciated. 2020-21 was a different, but very good year for the Association, and next year should be so as well. The UWRA is thriving and is dedicated to providing its members with a rich experience as it works toward our common goals.