



University of Iowa Retirees Association

AGENDA

November 8, 2016

1:00 PM Buffet Room 427 Levitt Center

Call to order – President Nancy Hauserman

Reports from Officers:

1. Approval of October meeting minutes – **Alice Atkinson**
2. Treasurer- **Kris Canfield**
3. President Elect – **Michael Barron**
 - a. Upcoming Programs
 - b. Other
4. President – **Nancy Hauserman**
 - a. Appointees to Nominations Committee
 - i. **Penny Hall**, chair
 - ii. **Nancy Williams**
 - iii. **Ken Atkinson**
 - iv. **Dean Borg**
 - v. **Billie Townsend**
 - b. Survey for Members (see attached)
5. Past-President – **Beverly Robalino**
 - a. Scholarship Update
 - b. Non-Profit Status (see attached summary)
6. Reports from Committees:
 - a. Program Committee: **Michael Barron**
 - b. Newsletter: **Linda Muston**
 - c. Membership: **Lois Lembke**
 - d. Funded Retirement and Insurance Committee (FRIC): **Richard Saunders**
 - e. Committee on Community and University Service Awards – **Pam Willard**
7. Old Business
8. New Business
9. Adjourn

Next meeting – December 13, 2016

10/21/16 Meeting re: Becoming a 501(C)3

Meeting with at NonProfit Center with Richard Koontz, Beverly Robalino and Nancy Hauserman
Re: Possibility of UIRA applying for Non Profit Status

Richard talked with us about the process of applying for non-profit status, the pros and cons of so doing and about the status generally.

The application process for us would be fairly painless and quick. There is a short form available for any group making less than \$50,000 in a year. That clearly applies to us. This is form 1023EZ which is 2 pages long and does not require much information. (contrasted to Form 1023 which is 28 pages and requires lots of information).

It would cost us about \$265 and ten minutes to file.

We first need to become officially recognized as a nonprofit corporation. That would cost \$20 and take a very short period of time. The process is Easy. If we don't become a nonprofit we would be considered an unincorporated association and there would be negative difference for us in terms of possible liability.

We also would need to get either an EIN or TIN (taxpayer ID.)We would do this after we secure NonProfit Corporate status. It is an extremely quick process – takes about 30 seconds according to Richard.

We need to look at our current By Laws to be sure they are consistent with our becoming an NPC. Richard is willing to look at our Bylaws as well.

If we become a 501©(3), every year we will be required to file a 990-N or do an electronic postcard.

Every other year we will need to file a Biennial Report which names the officers of the 501c)3. The form will be sent to us electronically.

Our Articles of Incorporation will need to name a Registered Agent. If we change who that Agent is we need to file the same. (We probably should name the UIRA treasurer as Agent)

We will need an address for the "corporation." We should see if we can use the Jefferson Building.

Pros of Becoming 501 (c)3

1. Postal rate : we get better rate for bulk mailings
2. Discount from some vendors,e.g., HYVee
3. Members' dues may be tax deductible for them (not clear and will need to check)
4. We can receive charitable gifts

5. Might motivate some folks to join or donate to us

Cons of becoming 501 (c) 3

1. Should check with University to see if they care
2. Some grants might be effected (not sure that applies to us at this point)
3. Tad bit of hassle but not much.
4. Some monetary cost

UIRA Membership Survey
November 2016

1. How many years have you been retired?
2. When did you join UIRA (approximately)?
3. Is your UIRA membership single or household?
4. What is your gender?
5. What is your age? (optional)
6. Do you attend UIRA events or programs in the 2015-16? If yes, about how many programs or events did you attend?
 - a. Do you attend the annual business meeting (hotel lunch) in April?
 - b. Do you attend the annual picnic in June?
 - c. Any comments about why you do or do not attend?
7. Are you satisfied with the programs and services provided by UIRA?
 - a. Yes
 - b. No
 - c. comments
8. Are there are programs/speakers you would like UIRA to be presenting? Please list.

9. If UIRA organized day trips (ie. provided transportation) to visit various sites or events in Iowa, e.g., the Figge Art Museum or a performance at Des Moines Performing Arts Theatre, would you be interested in going, assuming there was some cost for the trip?
 - a. Yes
 - b. No
 - c. Comments
10. Currently UIRA has a few special interest groups, the Gray Hawk Steppers (mall walking group) and a group that discusses World Events). Are there other special interest groups we could create that would interest you, e.g., a group that went to movies together or a book club or golf or tennis or music group?
 - a. Yes (please specify)

 - b. No
 - c. Maybe
11. Do you read the UIRA newsletter regularly? Is there anything you would like to see us add?
 - a. Yes
 - b. No
 - c. Comments

12. Overall, are you satisfied with the amount of communication you receive from UIRA?
- a. Yes
 - b. No (please say why)

 - c. Comments

13. Overall, are you satisfied with your UIRA membership? Is there anything else you would like UIRA to be doing?

OTHER COMMENTS

If you would like us to respond, please list your email address below.

THANK YOU SO MUCH FOR TAKING THE TIME TO COMPLETE THE SURVEY!