

UIRA President's Report 2018-2019

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We all know that big ships turn slowly and, regardless of how anxious we might be for them to change course, it takes more time than we would like. However, as I reflect on the past year (and being especially cognizant of the fact that it takes time to effect change in any large organization), I am pleased with the progress the Board and I have made on a number of areas that I targeted for advancement during my presidency, including revision of the Bylaws, adoption of organizational management software, resolution of questions concerning UIRA's non-profit status, and initial planning for next year's Big Ten Retirees Association conference, which UIRA will host in 2020. In addition, recruitment of a person to fill a Board vacancy and of nominating and award committee chairs and members presented me with further challenges.

Bylaws. The first of these was updating the Bylaws, which hadn't been revised since 2011. While I was revising the UIRA brochure, I consulted the Bylaws and realized that they no longer accurately reflected a number of aspects of how UIRA currently conducts business. The Board and I have crafted a number of significant updates and will have finished refining the language of the changes by the end of the year. The membership will be notified of the modifications once we have finished our work and the new Bylaws will be posted on the website.

NeonCRM, Organizational Management Software. Now that UIRA has more than 670 members, managing membership and events with Excel spreadsheets has become very cumbersome. Beginning last fall, I explored a number of organizational management software packages to facilitate and automate the administration of key aspects of our organization and its activities—particularly those involving membership tracking, events management and online payments—and reported my findings to the Board. Our interest in such software was prompted by reports from a number of retirees associations within the Big Ten Retirees Association that have moved to online solutions for administering their organizations and the success they've had with their online organizational management solutions. After considerable discussion and further exploration by an ad hoc committee consisting of Lois Lembke, Emil Rinderspacher, Kay Barron, Russ Lenth and me, the UIRA Board has committed to the adoption of NeonCRM, an organizational management software package for non-profits, to streamline and improve our operations. Neon meets our criteria in terms of functionality and cost. We plan to have this system up and running by fall of this year. Kay Barron and Russ Lenth will be taking responsibility for overseeing the implementation and customization of the system and overseeing the functions of the system.

501(c)(3) Nonprofit Status. This year the question about whether UIRA should file for 501(c)(3) tax-exempt status was raised. (Some of the Big Ten Retirees associations operate under 501(c)(3) status and others so not.) As I learned when I talked with past Board presidents, this issue has been revisited a number of times over the years. However, a lack of good documentation about why UIRA has not pursued this nonprofit status led us to investigate it yet again. Diana Harris and I met with Paul Thelan, Director of the Iowa Nonprofit Resource Center, who advised us not to file for 501(c)(3) status. He said that we were more appropriately classified as a tax-exempt 501(c)(7) membership/social organization and that we could operate

as such without filing any forms with the state. He did recommend that we file articles of incorporation, which we will be doing.

2020 Big Ten Retirees Association Conference. Planning has begun for the 2020 Big Ten Retirees Association Conference, which will be hosted by UIRA on August 7-9, 2020. The initial planning committee consists of **Penny Hall, Kathy Holeton, Penni Ryan, Mike Barron,** and me. I signed a contract with the Radisson Hotel and Conference Center in Coralville, where participants will stay and where our business meetings and some meals will be held. The committee will begin in earnest this year to make detailed plans for the conference.

Recruitment for Board vacancy and key committees. This year started with the need to fill the Board vacancy created when Doug True stepped down as an at-large Board member. Fortunately, Billie Townsend, who was the Board's top nominee for filling the vacancy, agreed to serve on the Board until 2020. Also this year there was a complete turnover of the membership of the Nominating Committee and the Service Awards Committee and of the management of the annual photo contest. So, it was my responsibility to recruit new chairs and members of those committees and find a new coordinator for the photo contest. Although **Penni Ryan** volunteered to take over coordination of the photo contest soon after I put out a call, constituting the committees turned out to be more of a challenge than I anticipated, although eventually the committees did come together. The members of the Nominating Committee were **Warren Boe** (Chair), **Alice Atkinson, Jamie Sharp, Larry Wilson** and **Mike Barron**. The Awards Committee members were **Sam Cochran** (Chair), **Beverly Robalino** and **Dean Borg**. I am so grateful to all of them for their invaluable service to UIRA.

I could not finish this report without acknowledging the work and support of the Board. **Emil Rinderspacher**, President-elect, has done a superb job of orchestrating, with the help of his committee, a wonderful lineup of programs. **Mike Barron**, Past-president, continues to provide his valuable leadership to the organization, serving on the Nominating Committee and the Big Ten Retirees Association Conference Planning Committee, and organizing the spring potluck at Terry Trueblood. **Kris Canfield** as Treasurer has been a conscientious keeper of our financial records. **Diane Martin** has been a wonderful Secretary, producing succinct and informative minutes for our meetings. **Lois Lembke**, membership chair par excellence, has continued to be the welcoming face of our organization (and we are indeed fortunate that she will continue for another term on the Board and for at least one more year as membership chair). **Diana Harris** assumed the editorship of the Gray Hawk and has maintained the high standard of this essential communications conduit set by the previous editor. **Chuck Dayton** has served as assistant to Lois for membership and he, too, will be serving another term and helping Lois in the transition to the online system. **Richard Saunders** keeps us up-to-date on FRIC (the Funded Retirement Insurance Committee). **Dean Borg**, who served this year as a member of the Awards Committee, **Benny Hawkins** and **Billie Townsend** provided their thoughtful input throughout the year. **Jean Hood** has served (also ex officio) as our Archivist, delivering materials to the UIRA repository of documents in the UI Archives in the main library. **Carolyn Wanat** is our liaison with the Emeritus Faculty Council. **Phil Klein** (ex officio member) does a great job with keeping the UIRA website up-to-date. It has been a real privilege for me to work with all of these people.