Introduction
Over the last 35 years both the University of Arizona and the resources available to its retirees have changed. When the UARA began in 1980 there were 10,443 university employees and now there are 15,615. This is the second UARA history; the first was prepared by Howard Greenseth to cover the first 12 years.

This new history covers the period 1978 to 2015. This 4-page summary is organized to follow the structure and content of the full version of the history. The full report is in an 8.5 x 11 spiral bound booklet. A copy is posted at the UARA website.

Over this 35 year period, there have been differences in how the organization functioned and how it was organized, how the retiree-related departments at the University worked with UARA, and which topics were of most interest to the membership. There have been different areas of UARA interest and effort over time.

The purpose of this history is:
• To describe how UARA began and proceeded to where it is today.
• To identify and reflect on key events and efforts over the last 35 years.
• To serve as a reference manual covering past events for use in thinking about future opportunities.

Highlights
• Beginning about 1980 changes in communication technologies have been substantial and they continue to change. These impact UARA as an organization as well as its individual members.

• During the 35 year UARA history, changes in the university and in people’s interests when retired have been significant, but relatively few changes have occurred in the structure and basic functions of UARA.

• Newsletter content, program offerings, and committee topics have changed over the years.

• UARA activities and structure are similar to those of most peer institutions, adjusted for physical location. UARA is relatively unique as it has an Executive Committee and Advisory Council in place of a Board of Directors.

• For UARA’s first 20 years, few people in the organization were involved in newsletter production because it was produced by the UA Department of Personnel. Also in this period, UARA presidents normally served only one term. During the last 15 years presidents have commonly served multiple terms. The University has provided office space on a continuing basis.

• Early on the UA provided benefits to individual retirees that were offered to regular employees. Also, early on the UARA contributed information to the Arizona Legislature relating to the safety of retirement funds and their contribution rates, and medical benefits.

• In recent years, like many social organizations, UARA membership has declined. Assessments of that phenomenon suggest new focal areas and operating strategies may be appropriate.


**Historical Context: Growth and Change**

A group of faculty in the early 1960s began meeting to discuss common interests and the problems of aging. In 1978 the Retired Faculty Committee was established and worked with the University Committee on Gerontology to develop activities related to university retirees. For practical purposes it soon focused on both Faculty and other Appointed Personnel and Staff retirees and the UARA was formed in September 1980. For roughly the next 20 years the UARA grew in membership, addressed legislative issues, and developed a range of events and activities for the membership.

One area of early activity was related to retirement issues. In 1971 a new retirement plan was established for all state employees. This Defined Benefit Plan was required of all new employees. In 1986 the Optional Retirement Plan (ORP) became available to all Appointed Personnel (faculty, professionals, and administrators); Classified Staff were required to use the 1971 plan. The reason was that Appointed Personnel had greater transfers among universities and the ORP was transferrable. But this changed some of the commonality among UA retirees. About half the Appointed Professionals and most of the Faculty selected the ORP. This is significant to UARA because the membership is now mixed by retirement type. If a program about the ORP is given the staff would not want to attend but those on the ORP would attend.

**Organizational Chronology**

UARA’s first problem was to identify who had retired as there was no official listing of those names. After a good deal of work it was concluded there were 700 retirees in 1979.

For the first 20 years the newsletter was published by the Personnel Department, and was titled *Jubilacion* (Spanish for “retirement” and implying a “happy” feeling). Retirees became involved in pre-retirement programs provided by the Personnel Department. In the early days the UA provided several things to retirees: full library privileges, bookstore discounts, reduced course fees, and free parking. The 1990s were also a period when legislation was proposed to take funds from the Arizona State Retirement System and use it for other purposes. UARA and other retiree associations that depended upon these funds were successful in encouraging legislators not to pass that bill. Additional efforts with the legislature were initiated for cost-of-living increases and the health care premium subsidy for those in the Arizona State Retirement System.

Around 2000, and continuing today, several changes occurred for UARA. The year 2000 marked the end of support by UA Human Resources, which had provided the newsletters for 20 years. That same year marks the beginning of a “no growth” membership period. It lasted about eight years, followed by a declining membership base that now seems to be leveling off.

The year 2000 also was when major changes in communications technologies became widely accepted, changing the ability of retirees to communicate with friends or seek relevant information electronically. This may have lessened some of the importance of why UARA was initially formed. It also marked the time when most of the key concerns about financial stability for state retirement funds had been alleviated.

**Management and Leadership**

The basic UARA management structure has remained relatively unchanged over the years. The original bylaws developed in 1980 had minor changes in 1984 but major revisions were made in 2011 and 2015. These recent changes included replacing the president-elect title with vice president and changing the Executive Committee composition as well as the membership on the Advisory Council. Effective in 2016 the UARA members will elect six people to the Executive Committee, and the Executive Committee will select officers from within the Committee. Each year the Executive Committee establishes goals and objectives and is the decision making body.

The first UARA office was in 1980 in the Student Union and was provided by Bill Varney, the Director of the Student Union. It remained there for 11 years. In 1991 it moved to Warren Avenue for 12 years (that building was torn down for building the UA Bio5 Institute). The office then moved to the Sun Building on Speedway for 12 years, and in March 2015 moved to the Babcock building on East Speedway. Early offices were staffed by volunteers and Jency Houser became the first office manager. The second manager was Pat Williamson from 2006 to 2011, when Trudy Jacobson was hired.
The UARA has had an Advisory Council almost from the beginning. Its members are made up of committee chairs, representatives of various university employee groups and those performing special operations such as newsletter editor and webmaster. At various times the Advisory Council also included UARA members who were a liaison to other organizations, such as the UA Faculty Senate or the Pima Council on Aging. Committees varied over the years as different needs were identified but the total number of committees was generally about the same over the years.

The UARA also has had a close working relationship with several UA administrative units. These include the UA Division of Human Resources; the UA Office of Presidential Events and Visitor Services; the UA Systems Control Office; University Information Technology Services; Office of University Relations and the UA Cares Campaign. In 2015 the UARA became an official affiliated unit of the Office of University Relations.

**Membership**
The membership increased regularly from 1980 to 1999 when it took a sharp decrease for one year and then recovered back to its previous high during 2004 to 2009. This was followed by a decrease through 2013 when the membership leveled off at about 650.

One reason for the drop may have been an increase in membership dues from $5.00 to $10.00 (a 100% increase!). In 2000 membership data storage was changed from storage on 3 x 5 cards to a spreadsheet. Overall the drop in membership may be attributable to several things including the dues increase, modernizing the database to remove deceased members and procedural changes on how membership is tracked.

There may be other reasons for the decrease, as new retirees have access to modern methods of communication and may not have the need for organizational membership, more alternatives are available for retirees today, and some may harbor ill feelings toward the UA because the retiree had a forced layoff. Importantly, the perceived need for legislative oversight became much less in recent years. UARA members are recruited or retained by several methods including having UARA representatives at the UA dinner for new retirees and asking them to make brief remarks to the preretirement sessions sponsored by the Division of Human Resources. Most years the new retirees were sent a UARA letter of invitation and a fall newsletter.

**Activities and Programs**
Activities and programs have changed over the years. In the early years there was more interest on legislative matters because of the amount of retiree-related legislation that occurred. The types of interest areas also changed over the years from things like book and bridge clubs to tours and educational programs. Since 2014 the UARA has partnered with the Pima Council on Aging and the Tucson Medical Center Senior Services for Educational Programs. These programs covered a wide range of activities such as science topics by UA faculty, death and dying or end-of-life issues, identity theft, and financial and health topics.

Several luncheons were held each year in the Student Union and speakers were from both on and off campus. By the 1990s, the UARA membership decided to have the luncheons off campus. Topics continued to be diverse and included UA speakers as well as those from off campus.

Group activities such as book and bridge clubs gave way to sporting events and tours of UA attractions, such as the Mirror Laboratory and the University Arboretum. Educational seminars covered a wide range of topics with a focus on financial and health topics but also included UA experts in various fields.

The UARA awards three types of scholarships to UA students: 1) Irving Yall Book Scholarship (began in 1998), 2) The T. R. Rehm Graduate Scholarship (began in 2008), and 3) the Van Ort UARA Undergraduate Scholarship (began in 2013).

**Communications**
The newsletter also has changed over the years with the title of *Jubilacion* from 1980 to 2012 becoming *UA Retiree News*. Over the years there have been six editors and the publication frequency has generally been three times a year. Financial support for the newsletter was provided by the Department of Personnel from 1982 - 1999 and beginning in 2015 the UA Office of University Relations helped fund the
newsletter. Since 2012 the Fall edition has been 12 pages and the other two editions were 8 pages each. The first UARA website was a single page in 2002 that included upcoming programs and contact information. In 2010 the website was moved to the UA and a new UA email account was established. Both the email and the website are supported by the UA and content is maintained by UARA. The website not only contains information about UARA activities and membership options, but it includes material on transitioning from employment to retirement, a wide range of information resources for retirees, and links to UA websites of special interest to retirees.

UARA surveys are done annually in most years to get member feedback on possible activities and UARA services. The UARA’s first brochure in 2002 was a single color on a folded sheet of legal size paper. In 2008, a new brochure was developed and in 2015 still another brochure was developed. The brochures are used to inform prospective members, as well as existing members, about UARA activities and resources. New logos for the newsletters were developed in 2008 and 2015 to complement revisions in the brochures.

**Working with Other Retiree Groups**

The UARA works with Northern Arizona University and Arizona State University retiree associations and representatives from those three groups meet annually to compare activities and to discuss common issues. The Arizona Board of Regents periodically updates a list of 15 universities that are considered peer institutions for the UA. The UARA uses the same listing for its peer institutions. Knowing how the peer institutions’ retiree associations operate, and the issues they face helps in guiding how UARA designs its programs and operations.

**How Time has Changed the UARA**

During the last 35 years there have been a number of changes experienced by UARA. First, the membership is not homogeneous (there are faculty, other appointed personnel, and classified staff); the age at retirement varies, the conditions of why they retired varies, and the university itself has changed in the last 35 years. The critical issues facing retirees are not constant. The ways of communicating have changed markedly and retiring UA employees today are connected to many people compared to what a retiree was like 35 years ago. In 1980 the University was smaller and many people knew each other and that carried over into retirement years. Today the University is much larger, more diverse in subject matter, and the communication and information methods have changed enormously since 1980.

**Historic Reflections from Members**

Ten UARA members wrote “recollections” of their UARA experiences and perspectives in the full booklet format of the history.

They include: Leonor Benitez, George Evanoff, Susan Green, Howard Greenseth, Jo Henry, Stardust Johnson, Janice Murphy, Gladys Sorensen, Cornelius Steelink, and Suzanne Van Ort. What the reflections all have in common is that the contributors served on the Advisory Council, chaired committees or were officers, and had interesting and different stories to tell. Their collective association with UARA covers the full 35 year history.

**Perspectives on UARA’s Future**

As the UARA enters a new era the organization will be transforming itself to maintain good relationships with past retirees, but also to become more attractive to future retirees. This is not the first time UARA has changed, and it is the same case with many peer institutions. The organization is made up of members and their lives have also changed as they have gone through their own transitions in recent years. Working together UARA members will seek solutions to the challenges before us.

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**Getting the Full History Booklet**

The full history booklet can be downloaded from the UARA website. Select “history” under the UARA Activities heading on the home page: [http://uara.arizona.edu](http://uara.arizona.edu)

A bound copy of the history booklet can be obtained from the UARA Office. Call 520-982-7813 or email to uara@arizona.edu

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