Preface

The concept for doing something special for the 35th anniversary came from Past-President Rose Perrill. The Executive Committee of the University of Arizona Retirees Association subsequently asked us to write a 2015 UARA history for our 35th anniversary. An earlier history was written more than 20 years ago and covered the first 14 years (1980 - 1994) as well as the two years before UARA formally became an organization.

Our approach included reviewing available activities and events, but we also wanted to present the perspectives of people who were active in the organization’s leadership during some of these years. We also felt it important to interpret some of the implications of the significant changes UARA faced and how the organization changed as a result. We presented historic data covering the key indicators of how the UARA functioned over the last 35 years and summarized key events. In several cases some additional information is given about other institutions that are our peers as a frame of reference.

We gathered our information and observations about the 35-year history from accumulated reports, newsletters, and interviews. We should also say that finding and summarizing all this information was not easy. There were a few gaps in the historical record, minor discrepancies in different parts of formal records, and some difficulty in finding and understanding the causative factors of changes that occurred long ago. We were able to address most of the conflicts through additional readings and interviews.

We also read the histories and trends of similar organizations and had discussions with former leaders in UARA to help interpret some of these observations. Therefore, this booklet is not just a listing of events and who did what. It also offers some explanations for how UARA started, how it matured, and where it is today. In this document, UA indicates the University of Arizona.

Many people were contacted and information resources used in writing this history. These include ten people who prepared reflections on their own involvement with UARA, and interviews with some who played a particular role in UARA. Their individual names are listed under “special acknowledgements” and in the index. A copy of the full UARA History in pdf format is on the website at http://uara.arizona.edu/history.

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UARA History 1980 – 2015

1. Introduction

The University of Arizona Retirees Association (UARA) was formed in 1980 after a two-year discussion period. Over these 35 years the university has changed and the resources available to retirees have changed. When the UARA began there were 10,443 university employees and now there are 15,615. This is the second history of the UARA; the first was prepared by Howard Greenseth, who was asked by President Jency Houser to prepare a “comprehensive written history.” This history was published as a series of eight articles in the Jubilación newsletter beginning in August 1992, covering the years 1980 – 1992. A short history of the early formation of the UARA was written by Gerontology Committee Coordinator Margaret Zube in April 1988.

This new history covers the period 1978 to 2015. It is organized as a historical guide for UARA members and future leaders. 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.

2. Highlights

- Beginning about 1980 changes in communication technologies have been substantial and continue. These changes impact UARA as an organization as well as its individual members.

- During the 35-year UARA history, the changes in the university and how people communicate have been significant but relatively few changes have occurred in the structure and basic functions of UARA.

- Newsletter content, program offerings, and committee topics 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 were involved in newsletter production and presidents normally served 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 university provided retirees support such as library and parking privileges, electronic mail, and discounts for performances and bookstore purchases. Also early on the UARA contributed information to the legislature on safety of the retirement funds and contribution rates, medical benefits, and facilitated university-retiree relations.

- 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.
3. Historical Context: Growth and Change

When university faculty and staff were retiring in the late 1970s, and UARA formation was being discussed, their university experiences were different than they are today. Those in UARA leadership positions in large part joined the university in the 1940s and 1950s. The growth in bachelor degrees began to increase in the 1950s and the growth in graduate degrees awarded increased substantially in the 1960s. Thus during the early years of the UARA, in many cases, its members already knew each other. Communication methods were also different than those of today. Meetings, printed material and the telephone were the ways people communicated. The first personal computer became available in 1978 and the first World Wide Web browser was not in existence until 1992. The first modern smart phones were introduced by Apple in 2007. These changes are important because they show the many ways that people communicate today. That in turn affects organizations like UARA, as people can communicate with friends without having to join an organization.

**University of Arizona Characteristics**

The University was established in 1885 and underwent a change in the 1950s as the state increased its percentage of urban population, World War II ended, and the G.I. Bill began. The provisions caused a consistent increase in growth in the student population and therefore in employees. Also in 1950 the National Science Foundation was established and by the 1960s the University of Arizona (UA) began to increase its research efforts with associated growth in graduate degrees awarded. The 1950s and the 1960s constituted a major transition period for the university, in both size and culture.

Over the last 25 years the numbers of university faculty and other appointed personnel have been growing faster than the number of overall employees while staff numbers have been decreasing (Table 1). Thus the profile of UA employees is changing at the same time people retiring have more options than in the past. This may be one of several factors that have caused UARA membership to decline in recent years.

**Table 1. Growth of Various Aspects of the UA Compared to UARA Membership**

<table>
<thead>
<tr>
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<td>Faculty</td>
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<td>2,128</td>
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<td>2,756</td>
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<tr>
<td>Total Employees</td>
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<td>12,599</td>
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<td>$345.1</td>
<td>$586.6</td>
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<tr>
<td>Students</td>
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<td>35,375</td>
<td>34,326</td>
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<td>UA Employees Retiring</td>
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<td>N/A</td>
<td>N/A</td>
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<td>297</td>
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<tr>
<td>UARA Members</td>
<td>147</td>
<td>770</td>
<td>800</td>
<td>990</td>
<td>640</td>
</tr>
</tbody>
</table>

*Notes: Years are calendar year. Student enrollments for 2015 are actually for 2014. Other Appointed Personnel include Administrators and Academic Professionals. UARA began in late 1980 so UARA Members above are for 1981. Data from UA Office of Institutional Research and Planning Support.

**UARA Characteristics**

The UARA changed over time for many reasons. Some of these reasons relate to the university environment, some to changes occurring in other societal sectors, and some relate to internal workings of UARA and the interests of its members. Both the university (in employees and students) and UARA (in members) have had peaks and valleys in membership at various times. The outlook toward potential retirees by both organizations...
has changed so changes should be expected in UARA membership over time. Some “retirees” did not plan to retire as they were laid off due to economic conditions or programmatic changes. Some retired for health reasons or a desire to travel. Some retired when they reached their target age for retirement. UARA membership grew until 1999 where it peaked at about 1,000 to 1,100 members for almost 10 years.

After discussions with several people involved in UARA membership activities it was concluded there were several reasons for ups and downs in the membership numbers:

- The number of people retiring is not constant. Periodic financial incentives to retire or financial cutbacks may cause more to retire.

- Methods for membership renewal or recruitment have changed over time. At times there were special efforts to contact people that did not renew or offers of free membership to new retirees. Jo Henry was membership chair from 2000 to 2011 and perfected the process of calling people to remind them to renew if they were late.

- Reasons for periodic declines may be due to members forgetting to renew their membership, new retirees that left the university with negative feelings (e.g., layoffs), and UARA programs don’t satisfy the needs of some retirees. Another reason that may increasingly be of concern is that retirees today have so many things to do that social organizations like UARA are declining in membership. This also happened with the UA Faculty Women’s Club and its discussion groups; the Club formally disbanded in May 2015, after 85 years in existence.

**Impacts of Retirement Options – Defined Benefit vs Defined Contribution Options**

The Arizona State Retirement System (ASRS) was created in 1953 to cover all state employees and the political subdivisions that agreed to participate (called the system). In 1954 non-retired Arizona teachers began participation in ASRS retirement plans. In 1971 there was a major legislative change for university and teacher retirees – moving from the older defined contribution (where the amount of money contributed defined the retirement benefit) to the new defined benefit (where salary and years of service define retirement benefits). At that time all UA employees could select to stay in the old system or convert to the new plan. New employees had to use the new plan. A minority of faculty chose to remain in the old system. As the years went by, faculty died off in the system, leaving the remaining faculty to share the ever increasing amount of money. Eventually these faculty members received a 13th check at the end of each year. Some of these checks exceeded $10,000. Those that stayed in the system but retired in 2003 or later could not participate in the 13th check because of lower investment returns in the ASRS fund, but those that had been receiving the check have continued.

Current UARA members represent retirees in both the system and the plan. The Optional Retirement Plan (ORP) was approved by the Arizona Board of Regents (ABOR) in 1986, and in concept was like the old “contribution” plan but with the change that the person could select the company and the types of investments for their contributions. The ORP is only available to faculty and other appointed personnel (that is, academic professionals and administrators). Staff remained in the 1971 defined benefit plan. One of its values was that if you transferred to another participating institution you did not disrupt your retirement plan. ABOR monitors the companies permitted under the ORP and occasionally modifies the listing based on experience and user feedback.
The practical effect of this on UARA members is that it created two “retirement methods” within our membership. All classified staff are required to use ASRS as their retirement plan and all faculty and other appointed personnel could choose either the ASRS plan or the ORP plan. Over time the vast majority of faculty and appointed professionals chose the ORP. The plan for classified staff remained as a defined benefit type of plan. About 40% of UARA members are classified staff that must use ASRS and most of the other 60% use ORP. Also changing over time was the ratio of staff to faculty and appointed professionals (see Table 1). In 1990, classified staff was 49% of all employees, in 2000 it was 46%, in 2010 it was 39%, and in 2015 it was 34%. How this retirement track difference affected UARA over the years is not clear, but in the early days of UARA there was a lot of interaction with the legislature on retirement-related issues and now there is much less.

There is another difference in faculty and staff retirements. Many faculty stay on at the university to do research or scholarly work, but staff do not. This continuation may be by reduced hours or by retirement and partial hire-back.

4. Organizational Chronology

Getting Started
About 1960 a group of faculty from several departments began meeting periodically to discuss common interests and the problems of aging. This resulted in the Dean of the Graduate College appointing a Committee on Gerontology. That committee was established in 1978 and was called the Retired Faculty Committee, with an objective to address issues of interest to retired faculty and staff (note the committee name addressed faculty but the purpose was to address everyone). Early hopes included a way of maintaining some communication between the University and its former employees and to study the feasibility of a new organization devoted to UA retirees.

The first step in UARA’s history was the decision by the University Committee on Gerontology to “develop the potential resources afforded by university retirees.” The committee asked Committee Coordinator, Dr. Margaret Zube, to organize a “Retired Faculty Committee,” whose purpose was “to find ways to assist retired UA employees, utilize retirees, and make retirement more interesting.” It was formed in October 1978 so it predates the UARA by about two years. Membership on the committee included former UA President Richard Harvill, George Sparks (the first UARA president) and nine others. The committee then asked the UA Personnel Department to prepare a newsletter for retirees; member (and former Graduate Dean) Herbert Rhodes suggested the title “Jubilación” because “it sounded jubilant and happy but relates to the Spanish word conceptualizing retirement” (actually Jubilacion is the Spanish word for retirement). The first newsletter, in April 1980, had a full page description on the Retired Faculty Committee by Rhodes. An early activity of the committee was to survey retirees to identify which programs or activities might be of highest interest. One problem was that the University had no list of retirees and the Arizona State Retirement System had a master list of all organizations with members; there was a lot of “hand work” involved. It was later determined there were 572 retirees.

When UARA was formed in September 1980, the purpose was “to foster the benefit, interests, and well-being of the retired faculty and staff of the University of Arizona through social, educational, and promotional activities, as well as to encourage continuing contact between retirees and the university.” The Retired Faculty Committee continued for several years (at least through 1982) and its function was “to become informed about, and to increase recognition of interests, capabilities, and needs of the University’s retirees; and to
initiate and participate in the development of policies and programs of benefit to the retirees, through them, to the university.” The above material was largely taken from a one page article in the April 1989 UARA newsletter, written by Margaret Zube.

**Early Years: 1980 - 1989**

In 1980 the first UARA meeting was held to formally establish an organization focused on the university retirees, but the Retired Faculty Committee continued. The first newsletter was published in April 1980. The name “Jubilación” that was originally suggested by retired graduate dean Herbert Rhodes was approved. The newsletter was produced by the Department of Personnel, with the Benefits Manager Marty Kilhullen, working on a computer, generating a list of all retirees (Marty is still a member of UARA in 2015).

President John Schaefer encouraged such an organization and provided initial funding to get it established. President Schaefer was scheduled as a speaker at its first meeting but had to cancel due to an important conflict. The Alumni Association provided funding for a survey of retirees. The Retired Faculty Committee continued managing the transition and found interest in such an organization was high. Items of greatest concern included inflationary impacts on retirement income, special retiree discounts for University events, and special interest groups such as bridge, bowling, travel tours, or political advocacy. Later in that year (1980) the UA Retirees Association was established. A Constitution and bylaws were approved and membership was open to all retired faculty and staff as well as their spouses or surviving spouses, and to other persons closely associated with the University.

The involvement of retirees in the pre-retirement programs seemed to be satisfying to both the pre-retirees and the retirees. The UARA developed committees and seminars to address the complexities of supplementary health insurance, dental plans, and financial planning necessary prior to retirement. Other topics of interest included Social Security, Arizona State Retirement System programs and psychological adjustments necessary prior to retirement. The UARA President began speaking at the Annual University Retirement and Awards function.

The initial UARA purpose was “to foster the benefit, interests, and well-being of the retired faculty and staff of the University of Arizona through social, educational, and promotional activities, as well as to encourage continuing contact between retirees and the University.” In 1984 this was changed to: a) To promote the interests and welfare of University of Arizona retirees and to encourage continuing contact between retirees and the University, and b) to provide the means for interaction among retirees through a diversity of cultural, intellectual, and social programs.

Early in 1981, the luncheon speaker was the head of the Art Department and he talked about enjoying modern art. After the luncheon a group of members discussed federal policy on aging and the formation of interest groups and things such as Arizona history, bridge, and legislative action. Early Luncheon Programs also included topics such as the Tucson Police Department speaking on the use of hypnotism in crime solutions, how to enjoy modern art, UA entertainers, the Old Pueblo trolley restoration project, and musical entertainment. The University Library informed retirees that they could obtain a library card and have full privileges at the library. Initial dues were $3 per year. In 1982, retirees were told they could apply for a free UA parking permit (which changed and was then reinstated), discounts were available for selected campus events, bookstore discounts, discounts for theme parks, and reduced course fees for UA classes. Later that year the UARA was also told that it had been given a campus office in room 107 of the Student Union building.
By this time the UARA met regularly for three luncheons a year, with a range of speakers. The University Personnel Department provided support, including preparation and distribution for the newsletter. Representatives from the UARA began speaking at the Annual Retirement and Awards function. This presentation continues today, apparently missing the session only in 1990.

By the late 1980s there were three UARA committees: Insurance, Legislative Action, and Volunteer Activities (to volunteer for units within the UA). For example, the Insurance committee surveyed how other states provided health insurance to retirees and summarized the various health care options. The Legislative Action committee recommended a “yes” vote on propositions related to hospital and cost containment, and gave advice to UARA members on how to write their legislators. A membership poll was in favor of having UARA luncheons off campus, reversing an earlier poll that favored on-campus luncheons. In 1988 the UARA president thought it best to “broaden” the UARA management structure. This resulted in the establishment of a “Council” (now Advisory Council) to broaden the input from various campus groups. The Advisory Council had minor modifications. In August 1985 the UARA was designated by the Internal Revenue Service as a 501(C)(7) organization. The specific title of this designation is “Social and Recreation Club” and it is tax exempt.

Note: the above material was largely taken from an 8-part series on UARA History (1978-1992) by Howard Greenseth, the eighth UARA president and active at the time with other retiree educational organizations in Arizona. The series appeared in the UARA newsletter during 1992-1994 in a series of one page articles.

Middle Years: 1990 - 1999
The Legislative Action Committee was especially active in the early 1990s, arranging for testimony from UARA members to appropriate legislative committees. Primary issues related to cost of living adjustments and working with the retiree associations from ASU and NAU so all three universities were acting in concert. Regular updates to bills were given to the UARA Advisory Council on topics of interest. The UARA Telephone Tree was quite active in the 1990s, calling members and explaining our concerns or support of retiree-related legislation.

In 1991 the Arizona Universities Retirees Council was formed. Its purpose was “to represent the mutual interests of the retiree associations at three state universities and to communicate their concerns to legislators, state government agencies, university administrators, and other groups affecting the welfare of retired persons.” The Council was disbanded about a year later.

In 1992 the UARA expressed concern about legislation proposed in 1990 to form a growth and development fund that would take funds from ASRS for the purpose of a one-time venture capital funding. (It did not happen.) The UARA also helped develop legislation to provide graduated health insurance benefits for retirees with 5 to 9 years of service. The UARA moved to its new office (the former house) at 1211 N. Warren which was provided at no charge to UARA through the efforts of former UA President Henry Koffler.

1 The more familiar designation is 501 (C)(3) is for organizations that spend their income on activities that further its charitable purpose. The 501 (C)(7) designation includes non-profit groups that are organized for pleasure and recreation, and they complete relevant forms to the Internal Revenue Service annually.
Membership grew in a regular manner until the late nineties (1997-1999). There was a lot of legislative activity in the 1990s; some was as information to legislators or reacting to proposed legislation and some was in the form of summaries of already passed legislation so the membership could understand new items and how it might affect them. Brief summaries of pending legislation were also developed and distributed appropriately. One particular piece of legislation was especially important to UARA members. Effective January 1992 health insurance rates for ASRS retirees would be reduced by a subsidy based on age and years of service. That subsidy is still in effect, although subsequent efforts to add a cost of living escalator were not successful.

Another topic where UARA was involved was a requirement that retirement contributions by the state were to be the same as contributions by the employee. This was due to periodic interest in reducing the state contribution to help balance the budget, but a law later required the two contributions to be equal.

The UARA was active in getting a cost-of-living increase through the legislature and a minimum benefit of $600 per month for retirees 75 years or older. Several workshops were organized for retirees and held at a local resort, covering the topics of “changing financial and legal perspectives after retirement” and “estate planning.” The welcoming committee was established to assist retirees and their guests when attending UARA group functions; this facilitated interactions with other members. The UARA assisted Arizona State University in establishing their retiree Association; in 1991 UARA also helped develop what was a short lived Arizona Universities Retirees Council.

Recent Years: 2000 - 2015

There were five significant changes occurring within UARA that were becoming evident around 2000. These changes and their effects were identified by comparing UARA activities and a range of data about the UA changes during the review of the histories and features of other related organizations, as well as the retiree organizations of UA peer institutions.

First, the year 2000 marked the discontinuing of UARA support by the University Human Resources Department (formerly the Personnel Department). The department had been doing some of the early editing and had given financial support for all the printing and distribution of the newsletter for the previous 20 years. This placed an unanticipated burden on UARA management and resulted in no newsletter production for almost two years, and likely some other disruptions.

Second, the era marks the beginning of a “no growth” membership period of about eight years and UARA subsequently experienced a declining growth period through 2015. This may be due to several factors, including the fact that it is not the only organization having declining membership. But it does not apply to all university retiree organizations. A 2015 survey of UARA peer institutions indicated a few had minor levels of decline but most noted growth. Growth in retirements might be expected as the first baby boomers turned 65 in 2011, but it also must recognize a university is made of people of all ages and some continue working past 65 (particularly some faculty).

Third, around the year 2000 the results of “information technology” changes that began in the 1980s had had significant effects. The UA now had a single system for electronic mail for the whole campus, websites had matured to be a necessary element of university life rather than a curiosity, and in the late 1990s cell phones were becoming light, useful, and popular. These changes opened new opportunities for everyone. While there were periodic budget reductions at the university, enrollment trends have been positive since 1996. People could now communicate with almost everyone and the potentially changing roles of organizations like UARA became a topic of discussion.
Fourth, also beginning around 2000 it became more difficult to find people willing to be UARA president. This resulted in people serving in that position for 2-3 years rather than one. Prior to 2000 there was only one person who served two terms as president. For 2000 and after, there is no one who served only a single year, and four served three years as president. The role of president is demanding!

Fifth, the “retirement related” issues (such as cost of living adjustments, investment opportunities, health insurance) had largely been addressed by the legislature and the ASRS. The role of UARA being an advocate for retirees may have become less concern for UARA members, as many of the needed changes that were faced in previous times had largely been addressed. In addition, some budget reductions of recent years resulted in forced retirement for some employees (particularly staff). Several people stated their displeasure at the UA at being laid off and were retiring, resulting in some ill feelings toward the university, and that because of that they did not want to join UARA. Another major change was the 1986 beginning of the Optional Retirement Plan for all appointed personnel. This caused many faculty and other appointed personnel to switch from ASRS to the optional program. UARA continued to have a significant focus on ASRS activities where all classified staff had their retirement program.

So the question resulting from these changed conditions is just what the appropriate role of an organization like UARA is today and in the future. Some observations are provided in the last chapter – Perspectives on the Future.

The UARA was fortunate to have former UARA president Keith Meredith appointed to the nine-member Board of Trustees of the Arizona State Retirement System by Governor Janet Napolitano. His three-year term began in 2003. In his years of service, he not only brought the perspective of educational retirees to the board but helped us to better understand the issues and solutions that are relevant to ASRS. For example, Keith regularly contributed articles to the Jubilación newsletter on subjects of interest to members.

In 2015 UARA served as an advisory to the UA group that was evaluating establishment of a University Club. This would be built on the parking lot east of the Marriott Hotel at Main Gate. This new building would contain “suites” for visiting faculty and others and have facilities for discussions and seminars. It would be available to all UA faculty and staff – active and retired. There would be an annual cost that would likely be comparable to the arrangement ASU has with its University Club.

5. Management and Leadership

Constitution and Bylaws

The first Constitution and Bylaws were developed in 1980, with a minor revision in 1981 to add the past president to the steering committee for continuity. Additional changes were made in 1984 to both Constitution and Bylaws; this version provided an Executive Committee but made no mention of an Advisory Council. Major revisions were made in 2011, which eliminated the Constitution (because of redundancy with bylaws), renamed the Vice President as President-Elect, and modified the format and nomenclature of the Bylaws. Member eligibility was expanded to include retirees from entities closely related to the UA (such as Alumni Association staff) and to include surviving domestic partners as well as surviving spouses. The Executive Committee was to attend Advisory Council meetings in a non-voting role. A revision in 2015 changed the composition of the Executive Committee, the election process for officers, renamed the president-elect as the vice president, and provided for the Executive Committee to be members of the Advisory Council.
Organization and Personnel
The basic management structure has remained relatively unchanged over the years but a number of small changes have occurred. The initial management group was the Executive Committee and it consisted of the president, vice president, secretary and treasurer. It was changed in 1981 to make it explicit that the vice president would be president the following year. In 2011, the vice president designation was changed to president-elect, in order to clarify that the “vice president” would become president the following year; the past president remained on the Executive Committee. Effective 2016 there were several management-related changes: the past president title was changed back to vice president, and six people would be elected to the Executive Committee and members of that committee would then select one of their own to be president, vice president, secretary and treasurer. All terms would be one year and could be successively elected. The immediate past president is designated as the chair of the Nominating Committee.

Prior to 2011 there was no formal Advisory Council although one existed. The formal version defined the Advisory Council as all UARA committee chairs, representatives from UA personnel organizations, and the office that was liaison to UARA (currently the Office of University Relations), and up to five additional people appointed by the president. Effective 2016 the Advisory Council includes committee chairs, representative of UA personnel organizations, and a representative from the Division of Human Resources and from the Office of University Relations. In addition, any active member of UARA can be a member if appointed.

The presidents from FY 1980 through FY 1996 all served one year terms but beginning with Herb Abrams in FY 1997 all but two presidents served two or three terms (through FY 2015). The common understanding was that it was difficult to find people to serve as president. Management activities have varied over the years, depending on the times and the officers. For example, there were variations in prescribing clear purposes and operating guidelines for committees.

Operations Guidance
There was an “Operations Handbook” developed in the late 2000s that serves as a reference manual for bylaws, position descriptions for officers and procedures for committees (including editor and webmaster). Some of these include formal procedures and others are operating guidelines to allow directions but with flexibility when appropriate. Presidents have put their own management style to work or follow the familiar process of the last president.

Goals and Objectives
Goals and objectives are set annually by the Executive Committee and generally include 4-6 goals. Some are extensions of past goals and some are new. Generally they include terms like strengthening external relationships with other organizations, sustaining UARA through member involvement, efficient and effective operations, providing scholarships, and energizing Advisory Council meetings. In the early 2000s they were more extensive and included improved communications with members, increase interaction with university groups and other retiree groups, increase retirement and health benefits, and increase membership. These earlier goals focused more on legislative and economic concerns of members because those were the primary concerns, and, may have been the reason UARA was formed. More recent goals have focused on information exchange and working with related groups.
UARA Offices
The initial organizational development efforts were held in people’s homes or personal offices. The UARA offices have been in four locations, each one provided by the University of Arizona.

- Warren Avenue - 1211 N. Warren Avenue, April 1991 to March 2003. The office was normally open portions of five days per week and staffed by volunteers. Note: this house is long gone and the BIO 5 building is in its place. This is on Warren Avenue (the street the new Street car uses for the Speedway underpass) at Helen Street.
- Babcock Building – 1717 East Speedway, Unit 3105, March 2015 through current.

Early offices were operated by volunteers and were intended to be a Resource and Referral Service Center for questions from retirees. Most of the time at the Sun building and all of the time at the Babcock Building UARA had part time, paid, office managers.

Jency Houser became the first formal UARA Office Manager from 1991-1998 even though she was unpaid and continued as a volunteer. She retired from the Department of Veterinary Science and later set up the Irving Yall Book Scholarship under the name of her late husband Irving Yall (also a UARA president). Office managers from 1999 to 2005 were a series of short-term volunteers. The second Office Manager was Pat Williamson who had retired from the College of Fine Arts. She served from 2006 to 2011. The third (and current) manager is Trudy Jacobson, who retired from Biomedical Communications in the College of Medicine and took the office manager position in 2011. In addition, she took on the responsibilities of Membership Coordinator and Newsletter Editor.

The appearance of cell phones and electronic mail changed the role of the office. In earlier days people would come by the office to find information, meet as a committee, or get questions answered. There also was a lot of telephone use, where a person would leave a message and UARA would call them back. Now the office manager can answer calls at any time via cell phone and much communication is via email. The office still serves a useful function, as a meeting space for small committees, a place for (physical) record storage, and a working space for the office manager or members of the Executive Committee.

UARA Advisory Council
When UARA was first established there was no requirement for an Advisory Council but one was voluntarily formed. The Advisory Council was first designated in the 2011 changes to the bylaws. This bylaws change allowed any member to attend and speak to the Advisory Council but not to vote. This change also indicated that members of the Executive Committee were expected to attend Advisory Council meetings but they could not vote; the president chaired the meeting. Members were representatives of UA personnel organizations and officers. The president could appoint up to five members at large, and all those representing an organization could vote. The 2015 bylaws changes kept the same basic structure of membership but had two types of members: any UARA member regardless of affiliation, and representatives of committees and organizations; however to vote you must be a UARA member. In general, the Council attendance was 20-30 at a given meeting. This change also made the Executive Committee as voting members of the Council. The Advisory Council meetings changed over the years, depending on the president and the times. In addition to
normal agenda items, one approach was to have outside speakers give a 15-30 minute presentation (including questions) as the first item of business at the meeting. Then the order was switched, and the outside speakers spoke after the formal meeting for 45-60 minutes. Since 2013 there have been no outside speakers.

Over the years the Advisory Council has met in various places. On-campus examples are the Vine Building and the University Foundation Building (Swede Johnson Building). Off campus examples include the University Medical Center, several local libraries, and the Habitat for Humanity new (in 2015) building. Some Advisory Council members are university employees and others are retired, so the best choice was finding a location that was convenient for both groups.

**Table 2. Advisory Council Member Categories**

Basically the Advisory Council consists of Officers, Committee Chairs, and Liaisons to or from campus or off-campus organizations, and members at large.

<table>
<thead>
<tr>
<th></th>
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</thead>
<tbody>
<tr>
<td>Arizona Retired Teachers Assoc (LT)</td>
<td>CARE (Coalition – see text below)</td>
<td>Appointed Professionals (LF)</td>
</tr>
<tr>
<td>CARE (Coalition – see text below)</td>
<td>Faculty Senate (LT)</td>
<td>AZ State Retirement Sys (LT)</td>
</tr>
<tr>
<td>Chairs of Committees</td>
<td>Gerontology Committee (LF)</td>
<td>Chairs of Committees</td>
</tr>
<tr>
<td>Gerontology Committee (LF)</td>
<td>Members at Large</td>
<td>Faculty Senate (LT)</td>
</tr>
<tr>
<td>Members at Large</td>
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<td>Human Resources (LF)</td>
</tr>
<tr>
<td>Newsletter Editor (SP)</td>
<td>Officers</td>
<td>Legislative (SP)</td>
</tr>
<tr>
<td>Officers</td>
<td>Staff Advisory Council (LT)</td>
<td>Luncheon (SP)</td>
</tr>
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<td>PCOA (LT)</td>
<td>Telephone Tree</td>
<td>Newsletter Editor (SP)</td>
</tr>
<tr>
<td></td>
<td>University External Relations (LF)</td>
<td>Officers</td>
</tr>
</tbody>
</table>

*LF (liaison from UA unit but not retired), LT (liaison to UA unit from member of UARA). SP indicates a single person activity. The CARE – Coalition of Active and Retired Employees of the Arizona State Retirement System, was active in the late 1980s and early 1990s but is no longer in existence.*

**UARA Affiliations/Liaisons (Generally Members of Advisory Council)**

These organizations may have had representatives on the UARA Advisory Council, or may not, depending on the times and what representatives were available. Those beginning with UA are normally members of the Advisory Council.

- Arizona Department of Administration (ADOA)
- Arizona State Retirement System (ASRS)
- Arizona Tri-University Retirees Association
- Council of Senior Citizen Organizations (COSCO)
- Governor’s Advisory Council on Aging (GACA)
- Older Adult Services & Information System (OASIS)
- Osher Lifelong Learning Institute (OLLI)
- Pima Council on Aging (PCOA)
- UA Appointed Professionals Advisory Council (APAC)
- UA Center on Aging (College of Medicine)
- UA Division of Human Resources
- UA Faculty Senate
- UA Staff Advisory Council (SAC)
- UA University Relations (previously External Relations)
Committees
The types and numbers of committees have varied over time.

Table 3. Snapshot for Committees for Four Selected Years (* indicates one person)

<table>
<thead>
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</thead>
<tbody>
<tr>
<td>Host/Hostesses</td>
<td>Historian</td>
<td>Education</td>
<td>Activities</td>
</tr>
<tr>
<td>Insurance/Benefits</td>
<td>Legislative Action</td>
<td>Legislative Action</td>
<td>Editorial</td>
</tr>
<tr>
<td>Legislative Action</td>
<td>Luncheon</td>
<td>Luncheon</td>
<td>Legislative*</td>
</tr>
<tr>
<td>Membership</td>
<td>Membership*</td>
<td>Membership*</td>
<td>Luncheon*</td>
</tr>
<tr>
<td>Newsletter Editor*</td>
<td>Newsletter Editor*</td>
<td>Newsletter Editor*</td>
<td>Membership*</td>
</tr>
<tr>
<td>Nominating</td>
<td>Nominating</td>
<td>Nominating</td>
<td>Newsletter</td>
</tr>
<tr>
<td>Program</td>
<td>Outreach (to sick)</td>
<td>Outreach (to sick)</td>
<td>Nominating</td>
</tr>
<tr>
<td>Volunteers</td>
<td>Reservations</td>
<td>Special Services</td>
<td>Outreach (to sick)</td>
</tr>
<tr>
<td></td>
<td>Telephone Tree</td>
<td>Telephone Tree</td>
<td>Social/Networking</td>
</tr>
<tr>
<td></td>
<td>Volunteers</td>
<td>Volunteers</td>
<td>Telephone Tree</td>
</tr>
<tr>
<td></td>
<td>Welcoming</td>
<td>Webmaster*</td>
<td></td>
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</tbody>
</table>

Note: There are specific functions over the years that moved from committee to an individual. These include Luncheons and Membership (coordinator titles since 2011), Webmaster since 2002, Legislative in the last 10 years, and the Newsletter Editor for all years. An * indicates a single person.

Table 4. UARA Committees by Decade (if appeared within the time frame indicated)

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>Entertainment</td>
<td>Bridge Players</td>
<td>Activities</td>
</tr>
<tr>
<td>Health Insurance</td>
<td>CARE* (Coalition – see text)</td>
<td>Communications</td>
</tr>
<tr>
<td>History (other than UARA)</td>
<td>Education</td>
<td>Editorial</td>
</tr>
<tr>
<td>Host/Hostesses</td>
<td>Historian</td>
<td>Education</td>
</tr>
<tr>
<td>Insurance/Benefits</td>
<td>Host/Hostess</td>
<td>Human Resources</td>
</tr>
<tr>
<td>Legislative Action</td>
<td>Insurance/Benefits</td>
<td>Insurance/Benefits</td>
</tr>
<tr>
<td>Luncheon Programs</td>
<td>Legislative Action</td>
<td>Legislative</td>
</tr>
<tr>
<td>Membership</td>
<td>Luncheon Coordinator</td>
<td>Luncheon Reservations*</td>
</tr>
<tr>
<td>Newsletter Editor*</td>
<td>Membership</td>
<td>Luncheon*</td>
</tr>
<tr>
<td>Nominating</td>
<td>Newsletter Editor*</td>
<td>Membership*</td>
</tr>
<tr>
<td>Program</td>
<td>Nominating*</td>
<td>Newsletter*</td>
</tr>
<tr>
<td>Social</td>
<td>Officers</td>
<td>Nominating</td>
</tr>
<tr>
<td>Telephone Tree</td>
<td>Outreach (to all members)</td>
<td>Outreach (to sick)</td>
</tr>
<tr>
<td>Volunteer Activities (for Retirees)</td>
<td>Program</td>
<td>Program</td>
</tr>
<tr>
<td></td>
<td>Reservations</td>
<td>Promotional</td>
</tr>
<tr>
<td></td>
<td>Special Events and Entertainment</td>
<td>Scholarships</td>
</tr>
<tr>
<td></td>
<td>Special Services</td>
<td>Telephone Tree</td>
</tr>
<tr>
<td></td>
<td>Telephone Tree</td>
<td>Travel</td>
</tr>
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<td></td>
<td>Volunteers</td>
<td>Volunteers</td>
</tr>
<tr>
<td></td>
<td>Welcoming</td>
<td></td>
</tr>
</tbody>
</table>

An * indicates a single person.
Special committees of short duration or a narrowly focused topic are not listed. An example is the communications committee that evaluated communication options and used two member-focused groups to help identify needs and solutions. Some topics may have started as a committee but were really operated by a single person, often, with the term “coordinator.” This happened early in 2001 with Luncheon and Membership. Sometimes the distinction has not been clear, where a person might be referenced as a committee chair when they were actually the whole committee and served the role of coordinator.

Most committee names are generally of common meaning but some need an explanation. For example, in 1990 the Volunteer Activities Committee prepared a listing of places in nine UA administrative units and six community organizations that could use volunteer help. The listing included a description of work, skills, hours, training, benefits, and general remarks.

In the early 2000s there were specific guidelines for committees when they were formed, including purpose and procedures, and funding if appropriate. Such guidelines may have covered other years. Overall operational guidelines vary over time depending on the makeup of the Executive Committee.

**Working with University of Arizona Administrative Units**

Over the years UARA worked with the UA in a variety of ways. For example, for the first 20 years the Department of Personnel (later Department of Human Resources, and still later the Division of Human Resources) provided the editing, preparation and mailing of the newsletter. Over time UARA needs changed and then some university policies have changed. But the UARA maintains a good relationship that lets the organization deal with a variety of important functions. Examples include:

- **UA Human Resources** helps UARA by informing pre-retirees about UARA when the employees visit the HR offices for advice on their upcoming retirement. In addition, they provide the UARA office manager with an annual list of names and addresses of all those UA employees who retired in the previous fiscal year (by June 30). That list is used to mail letters of invitation to this group inviting them to join UARA.

- **Every May,** the UA Office of Presidential Events & Visitor Services extends an invitation to UARA, asking several people from UARA to attend the Annual Retirement Dinner. There, UARA is able to promote joining the Association by talking to the new retirees and handing out copies of the newsletter containing a welcome letter and membership form.

- **The Office Manager** works with UA Systems Control by reporting deaths of all retirees (both UARA members and non-members) as well as active employees who pass away during their employment. As a result, Systems Control is able to maintain a listing of current, retired and deceased employees. UARA obtains the information from various sources, including obituaries, news articles, and contact from family and friends of the deceased.

- **The University Information Technology Services (UITS) unit** provides UARA with web hosting and support.

- **The Office of University Relations** assists UARA with graphic design and office support. It also provides financial support for the UARA’s three newsletters per year and the annual membership renewal postcard. In 2015 the UARA executed its first formal Memorandum of Understanding with the UA,
addressing how the two organizations would work cooperatively, and became a formal affiliated unit of the Office of University Relations.

- The annual UA Cares campaign requests the UARA to publicize the yearly fundraising effort in the newsletters. UARA’s three scholarship funds are listed on the UA Cares pledge forms that are mailed to all retirees, and donors can contribute to any of the scholarships during the campaign.

- The UA Foundation holds UARA’s endowments (such as the Sparks Gerontology account) and scholarship funds and is instrumental in providing assistance in the yearly scholarship recipient designation process. The UA Foundation also has been helpful in arranging for and providing meeting space for the Advisory Council and other meetings. During those events, refreshments ordered from Student Union Catering (now known as Arizona Catering Company) were provided if in campus buildings.

6. Membership

Benefits of Membership

- Reconnecting to the University of Arizona, keeping connected, renewing old friendships with former colleagues and being part of a group of friends.
- Obtaining information about topics of importance to retirees.
- Accessing group activities such as education seminars, group events, and luncheons.

Types and Dues

Initially the membership classifications were member, spouse, and surviving spouse. A person could join as an annual renewal or as a lifetime member. The lifetime member option was eliminated in 2014 and the spouse category (not surviving spouse) was eliminated by a bylaws change in 2011. Figure 1 shows the membership numbers since UARA began in 1980.

Membership fees (dues) have increased three times in the last 35 years.

Annual membership:
1980 Annual at $3, raised in 1989 to $5, rose to $10 in 1999 and to $20 in 2013.

Multi-year or lifetime membership:
1994 Life Membership at $100
2002 Life Membership increased to $125
2013: Life Membership increased to $250, annuals available for $80 for five-year period
2014: Life Membership discontinued, annual price and five-year price remains the same
The membership sharp drop in 2000 and the four year recovery seemed to involve several factors: a dues increase, cleaning up the database (where some lifetime members were listed but were deceased), and procedural changes in how membership was tracked. Further complicating the situation was a two-year period where newly retiring employees could get a free membership and a change of UARA personnel who kept membership records. It was also during this period when the “database” moved from 3x5 cards in a cabinet to a computer using a spreadsheet. “Smoothing over” the one-year drop in 2000 with the gains over the next five years resulted in the maximum membership numbers occurring over about a 10-year period (1996 to 2006). During those years the membership ranged from about 1,000 to 1,100. The membership then dropped for almost 10 years and now seems to be leveling off at around 650. UARA is an exception among peer institutions; most are gaining members, so the declines are not due to simple demographic shifts or the generally widely reported and accepted lowered enrollments in many social/service-oriented organizations.

In June 2015 there were 640 total members with the following characteristics:

- Life members - (324 or 51%) are about the same number as annual renewal members (317 or 50%) (Life members do not have to pay renewal fees so it is more difficult to track which are still active)
- Classified Staff - 277 (43%)
- Faculty - 251 (39%)
- Other Appointed Personnel- 91 (14%)
- Surviving Spouses - 4 (about ½ percent)
The composition of UARA membership was further explored in 2010 by the Communications Committee. The committee found there are three types of UARA members:

- **Transition Group** — prospective members who are not yet retired so they are not really members but are seen as “pre-recruitment possible members” and recent members (less than five years).

- **Older Group** — those who have been retired long enough to “settle in” to a way of life. They may have trouble with meeting attendance due to age, health issues, different interests, or need for special transportation.

- **Intermediate Group** — the group in between the above two groups. These people constitute the bulk of our membership; these are generally active and have completed their “transition” period.

The committee also found members interact with UARA in three ways:

- **Social interaction** — through existing luncheon meetings or special topic presentations or discussions.

- **Information gathering** — they want information on a specific topic (e.g., medical, financial).

- **General information** — such as alerts to information provided by others, guest speakers on interesting topics.

**Recruitment and Retention**

There are several UARA recruitment methods including:

- Several UARA members attend the UA dinner for new retirees. The UARA President or another representative makes brief remarks to the whole group and a few UARA members talk to retirees during dinner to answer questions about UARA.

- The fall newsletter and letter of invitation are sent to those recently retired. For a few years in the past the fall newsletter was sent to all retirees who were not members of UARA. This process had a very poor return (about a dozen joined) and it was costly, so it was soon discontinued.

- The UA Division of Human Resources provides several pre-retirement seminars each year and UARA has participated since its 1980 beginning. While the format has changed slightly over the years, it currently has three workshops per calendar year with separate half-day sessions for Arizona State Retirement System (ASRS) retirees and for Optional Retirement Plan retirees. Periodically the Division conducts workshops specifically for UA Faculty and other appointed personnel regarding post-retirement financial planning. The UARA participates as one speaker in these sessions. The Division also provides pre-retirement information or medical benefits choices on their website. They also have an on-line manual “Getting Ready to Retire” which lists UARA as an available organization. The UARA website also has some general references to retirement questions and issues.

Another method for recruitment is for some UARA members to invite a recent non-member retiree that they might know to a UARA luncheon and treat the friend to the lunch. Members of the Executive Committee also make personal contacts with some new retirees.

Retention of UARA members has varied over the years but has become a more important concern in the last 10 or so years. Membership has been declining since about 2005. Several attempts have been made at
retaining members, including short special programs before or after Advisory Council meetings, seminars on topics suggested in member surveys, providing a broader range of types of information in the newsletter, and special events (like a tour of the new Tucson streetcar and its maintenance shops). There has been a heavy emphasis on trying to provide programs and events that are of interest to the new retirees as well as those who have been a member for a long time. At one time personal contact was made by a membership committee representative to find out why a member did not renew. Some of these were successful but they took a lot of personal time from the membership person.

Possible Reasons for a Membership Decline
It is not entirely clear but these factors have surfaced when the topic was discussed (order is alphabetical with first word):

- Activities offered by UARA are not what the retiree is seeking.
- Dissatisfaction with the university because the retiree was forced to retire
- Employees today can find lots of information about retirement or retiree activities in many ways.
- More alternatives are available for new retirees to explore than in the past.
- Some employees are retiring younger than in the past and don’t need a “retiree club”.

7. Activities and Programs

In the early days there were two primary types of activities: 1) social activities with full group or smaller group special interest topics, and 2) awareness-raising efforts with the Arizona Legislature by meeting with legislators and explaining the issues from the university or employee perspective. In these early days there were significant changes underway in retiree-related legislation that involved retiree benefits, contribution rates, or an occasional effort on the part of the legislature to take money from the ASRS retirement fund and use it for general state expenditures or for investing in venture capital schemes.

There was a lot of effort on the part of members helping other members. Committees were more active in the early formative days and the Advisory Council meetings were well attended. The number and types of committees changed significantly over time. See examples of the changing committees in Tables 2, 3, and 4. Almost since the beginning, the UARA has provided for connections with other organizations. This works in both directions; they send a “liaison” to our meetings and UARA sends one person to their meetings. Examples included university departments, faculty/staff groups, or community groups (like Pima Council on Aging).

There are also some “third party” groups affiliated with the university or managed by the university that are of interest to UARA members. Example include OASIS Institute, Osher Lifelong Learning Institute, Road Scholar (Elderhostel), and Humanities Seminars (there are costs for all of these). At times representatives of some of these groups were on the UARA Advisory Council.

Luncheon Speakers and Topics
The primary UARA events over the years have been the luncheons. They served multiple purposes, including receiving updates from current UA presidents and other administrators, talks on interesting subjects by UA faculty, and a place for social interaction with fellow retirees that the attendees may have known or had just met for the first time. In the early years there was a lot of entertainment, almost always by a UA group (singers, orchestra, or dance); this was later dropped because of the cost. Also in the early years the location was the UA campus but in later years it was primarily at resorts or hotels. In some of the later years there was
background entertainment while waiting for lunch. The one thing that was constant over the years was a target of three luncheons per year. It has been a tradition to invite UA administrators to speak at the Fall luncheon about the state of the UA, including updates and plans for the future. It also gives the retirees an opportunity to interact with UA administrators.

Early Years 1980 - 1989
All but two of the 17 luncheons were held at the Student Union. The other locations were Davis-Monthan Air Force Base Officers Club and the Elks Lodge. Typical events had a speaker or entertainment. Speakers included UA professors talking about aspects of their fields, Steve Emerine of the Arizona Daily Star, UA President Henry Koffler and Governor Bruce Babbitt. Three luncheons had entertainment rather than a speaker and three had no speaker or entertainment.

Middle Years 1990 - 1999
Only three luncheons of the 17 were held in the Student Union (both in 1993); others were held at various country clubs, hotels, restaurants or an Elks Lodge. Ten of the luncheons had no speaker or entertainment. Speakers included Congressman Jim Kolbe (twice), State Representative Andy Nichols (a UA professor) and Senator Ann Day. Former UA Dean of Medicine Merlin DuVal spoke when he was Chair of the Arizona State Retirement System Board, and Assistant Vice President for Human Resources Patricia Hutton. Entertainment as the main event was available three times, one of them by the UA “University Entertainers”, one by School of Music professors Robert Wrenn and Keith Thorson, and one by professor Al Mead and his wife (on ball room dancing). Some of the entertainment shared the platform with a speaker.

Recent Years 2000 - 2015
None of the 35 luncheons were held on campus (note: this is a 15 year period rather than 10 year periods as above). There were 16 luncheons with no speaker and locations were country clubs or golf clubs (18), Tanque Verde Guest Ranch (12), hotels (4) and the historic Manning House (1). Speakers included UA Presidents Peter Likins, Robert Shelton, Eugene Sander, and Ann Weaver Hart. President Emeritus John Schaefer spoke at the spring 2015 luncheon in celebration of the UARA’s 35th year. Other speakers in these years included VP for External Relations Stephen MacCarthy, Senior VP for University Relations Teri Lucie Thompson, Provosts Andrew Comrie and Meredith Hay, UA Foundation President James Moore, Deputy Director of Athletics Rocky LaRose, and Football Coach Rich Rodriguez.

Scholarships
The UARA provides three scholarships through the UA Foundation. The on-line applications are maintained by the UA Foundation and the UARA Scholarship Committee reviews applications and selects the awardees. During that endeavor, the UA Office of Scholarships & Financial Aid helps by pre-screening the applicants to make sure they are eligible for the awards. The UARA Scholarship Committee has made 25 awards since the program began in 2004, providing $23,700 to the students.

- Irving Yall Book Scholarship
  In 1998 Jency Houser Yall gave a sizable donation in the name of her husband, Irving Yall. These funds have provided scholarships each year to one or two undergraduate students (freshman or sophomore) who are Arizona residents with demonstrated financial need for assistance in purchasing textbooks. It is funded by the Irving Yall endowment.

- Tom Rehm Graduate Scholarship
  Established in 2008 by Professor Emeritus Dr. Thomas R. Rehm, this scholarship is for a graduate
student who is admitted to a graduate program and who is pursuing studies related to aging issues. Preference is given to Arizona residents. There is an option for renewal provided a minimum 3.5 GPA is maintained. A Master's student may receive the award for up to two years; a Doctoral student may receive the award for up to three years. It is funded by the UARA T. R. Rehm endowment.

- **Van Ort UARA Undergraduate Scholarship**
  This scholarship was established in 2013 by Dr. Suzanne Van Ort, UA College of Nursing Dean Emerita and UARA Past President. It is awarded annually to an upper division (junior or senior) undergraduate student who is enrolled full time in a health-related major at the UA. The student should have an academic emphasis and career focus on healthy adult aging. It is funded by the Van Ort endowment.

**Cumulative Listing of UARA Activities**
Activities changed over the years as conditions and the membership interests changed. This listing is alphabetical. Some lasted a very short time a long time ago (e.g., Book and Bridge clubs), others were single event activities (e.g., tours of UA campus), and others were multiple events (attendance at sports events). Examples are:
- Birdwatching at Agua Caliente Park
- Book Club
- Bridge Club
- Campus bus tours
- Gas Light Theater
- Group Travel
- Informal luncheons coupled with activities (e.g., UA Bear Down Kitchen, O’Malley’s on Fourth Avenue)
- Picnics
- Tucson Sunlink Streetcar (ride and tour of maintenance/control facility)
- UA Campus Arboretum Tour
- UA Men’s and Women’s basketball game
- UA Men’s baseball game
- UA Mirror Lab Tour
- UA Tree Ring Laboratory Tour

**Cumulative Listing of Educational Seminars**
Special presentations or seminars have long been a UARA feature. Meetings were held in various places in the Tucson area. Since 2014 the educational seminar process was changed to cooperatively work with the Pima Council on Aging (PCOA) or Tucson Medical Center Senior Services (TMCSS) or both for a single presentation. Seminars through UARA include:
- Alzheimer’s Disease: Research Results and Issues
- An Economy Full of Conundrums!
- Arizona and Space (Lunar and Planetary Science)
- Behind the Scenes of “The Desert Speaks”
- Can Diet and Exercise Prevent Cancer?
- Caregiving
- Community Emergencies, Personal Preparedness
- Death and Dying/End of Life Issues
- Economic Update
• Fighting Back Against Identity Theft
• Financial Workshops
• Health Care Reform
• Hearing & Talking As We Get Older
• Is America Going Broke?
• Medicare “Modernization
• Medicare and the New Health Law (with PCOA)
• Our Pensions: What We Need to Know (with ASRS)

Joint presentations with PCOA or TMCSS or both (beginning 2014)
• Fraud
• Guarding Your Wallet
• Medicare
• Medicare Fraud (What it means to You)
• Navigating the Health Care System as We Age
• Valley Fever in People and Pets

8. Communications

One of the most important functions of the UARA is to communicate with its own members and other related organizations. The methods for communicating have changed over the years as new techniques became available or the needs of the organization changed. The first approach was the traditional meeting – small groups of people working to form the organization as well as larger meetings open to the whole membership, along with a printed newsletter. These meetings were all face-to-face with augmentation by telephone. Over time these methods are still used but the use of electronic mail has become the norm for conducting business among officers, Executive Committee, Advisory Council, and increasingly, some members. The website is used for announcements, reference material of interest to members, and posting the newsletter (in addition to traditional mailings).

Newsletters
The first formal edition of the University of Arizona retiree newsletter was published in April 1980, under the name “Jubilacion” (Spanish for “retirement”), by the University of Arizona Department of Personnel. It was a product of the “Retired Faculty Committee,“ which was established in 1978 by the Committee on Gerontology.

The purpose was to inform members of upcoming events, report previous events, and report on activities of interest such as the University of Arizona, UARA, Legislature, general retiree/aging people sources, and member surveys.

Newsletter Editors and Production Issues
For the first 20 years the UA provided newsletter management through the Personnel Department (in 1991 the name was changed to the Department of Human Resources, and then Division was used). This included editorial guidance, printing, and distribution. From 2002 to 2014 the UARA provided most of the financial support, and in 2015 the Office of University Relations provided financial support for printing. Editors were:
• John Robertson, Department of Personnel, 1980 (one issue)
• Charles Norling, Department of Personnel, 1980 (one issue)
Newsletter Content and Organization

The size, look, and content of the newsletter have changed over the years, as experience was gained and new technology became available. The first two issues were four pages and published twice a year, with a fairly simplistic look. Part way through that first year, the pages increased to 8 and the look was slightly modified. The size changed from 4 pages, to 8, to 12, to 16, back to 12, and by September 2012 it was back to 8 pages. The frequency changed from two issues per year to four issues and then to three issues, where it has remained for several years. Beginning in 2012 the Fall edition has been 12 pages and is sent to recently retired faculty and staff as well as members. The other two issues for the year are 8 pages and are sent only to active members.

In 1999 there was a major restructuring of the entire format – representing a move to new designs and production processes. This included a new masthead, a shift to two columns for interior pages and one column on page one (previously all pages had a single column). In 2002 there was another significant restructuring and in 2009 the UARA logo was used for the first time.

In 2002 the front page was one column with an adjacent table of contents and one column on interior pages. In the 24th year the newsletter was 12 and 16 pages and began three issues per year. The masthead changed several times, with a temporary inclusion of the UA Block A and University of Arizona in the years 1990 - 2000.

In 2011 there was another change, with the addition of a new subtitle (News from the University of Arizona Retirees Association) and a shift of the UARA logo from the left side to the right side; there also was a shift to three columns on all pages (except for tabular material such as listing of legislators or deceased retirees). In 2012, for January and April three columns were used for every page.

For 22 years, the title “Jubilación” remained but the subtitle changed:

- 1980 - 1999 – All UA Retirees Newsletter
- 1999 - 2000 – A Newsletter for University of Arizona Retirees
- 2000 - 2002 – (no newsletter published for all or most of this period)
- 2002 - 2011 – A UARA Publication for Retirees
- 2011 - 2012 – News from the University of Arizona Retirees Association

In 2012 another major restructuring of the newsletter occurred. The name and subtitle changed as well as the paper, ink colors and basic content. These changes were made with the help of several UA communication professionals and with the help of member focus groups and surveys in previous newsletters. Newsletters from 10 other retiree organizations were assessed. Several new newsletter titles were evaluated. The final name change was based on relevance to the UARA, clarity to potential new retirees, and ease of referencing by others. Type fonts were changed, color was added, and guidelines developed for topical content. In addition a new “Newsletter Editorial Board” was established, with the three members representing the Editor,

• Robert Stirling, as a member of Department of Personnel 1980 - 81 and as a UA Retiree, 1982 - 99
• No specific editor (group effort), Department of Human Resources, 1999 - 2000
• From Spring 2000 to Winter 2002 there were no newsletters published as a new editor was sought.
• Fran Janssen, UA Retiree, 2002 - 2003
• Janice Murphy, UA Retiree, Editor, 2003 - 2011.
• Jean Discorfano, Newsletter Layout, 2003 - 2011
• Trudy Jacobson, UA Retiree, Editor, and Office Manager, 2012 - current
• Jane Dugas, UA Retiree and Newsletter Layout, 2012 - current
Layout, and Chair of the Communications Committee. After final evaluation by the Advisory Council the new
design was implemented with the September 2012 issue. The change included a new name, UA Retiree News,
with a new subtitle, The University of Arizona Retirees Association Newsletter.

**UARA Talk**

This was a “newsletter-like” publication that served as a supplement to Jubilacion. It was mailed separately
and was published from March 1990 through April 1998. There were 3-4 issues per year that were 2-4 pages in
length. They were intended be short summaries of “what was going on” that may affect UA retirees. Irving Yall
was the editor for its eight-year existence.

**Website**

The first UARA website was developed in 2002 by Jean Discorfano, who also was the “production manager”
for the newsletter. This early website consisted of a single page and the user scrolled down to see a series of
announcements or other relevant links. The website was redesigned and moved from the original vendor,
dakotacom.net, to a UA server in 2007, with an Arizona.edu address. A major change was made in 2010 as the
capabilities of the UA web support teams were extended to hosting the UARA website. UARA maintains
content and the UA keeps the software current and provides the server.

From 2010 through 2015 the webmaster has been Roger Caldwell, who facilitated a series of discussions on
communications changes and member feedback. The website underwent a major change to utilize new web
support capabilities at the UA. This initially involved using “Drupal” as the software, which had many
capabilities but was very hard to manage. With the introduction of Drupal capabilities there were major design
changes in the website.

In October 2011 the website was moved to another UA server, and when that server was hacked by outsiders
in December 2012 the website was moved to still another server. Fortunately the University Information
Technology Services purchased a new “site-in-a-box” software product that had the capabilities of Drupal but
was much easier to manage and use. The UA moved the UARA web content to the new program in January
2013. Since that time UARA has been responsible for all content and specific design but the UA maintains the
security and underlying program updates. The current UARA website continues to use the “site-in-a-box”; the
UARA served as one of several test migrations to this new function. During these revisions the website was
expanded to include retiree-related information and not just UARA specific information.

Example areas of coverage in 2015 are:

- **Welcome**
  The home page has the major links described below. In addition, it lists current activities, meeting
  notices, and special announcements. Contact information and common interest items are listed at the
top of page: About Us, Events, User Guide, Index, and Other University Retiree Associations.

- **UARA Activities**
  Newsletter (current and previous): Goals, History, Activities, Reports, Scholarships, Advocacy,
  Volunteer Opportunities.

- **Membership**
  Join/Rejoin/Review, Member Benefits, UA Retiree FAQ, Join an Interest Group, Update Our Records.
• **Transitions**
  Preparing for Retirement, Adjusting to Retirement, Surviving Spouse, End of Life Preparation, Giving and Getting Care.

• **Resources for Retirees**

• **UA Info**
  Campus Events Calendars, Educational Opportunities, UA Now and LQP (Lo Que Pasa – an employee newsletter), Human Resources-Retiree Info.

**Electronic Communication Alerting Option**
Since 2012 all internal announcement-like communication has been via email (Executive Committee, Advisory Council, Committees). Regular (face-to-face) meetings are held by all of these groups but announcements and reports are frequently shared via email.

In 2013 UARA tested an “electronic alert” system with a pilot group of members. The test group was invited to participate and specific announcements or feedback options were available. This lasted about six months and was finally disbanded. One problem was getting members’ current email addresses. Even though the UARA had email addresses of many members, people tend to change their email addresses. It was decided the need for alerts was not high and the effort at maintaining a functioning process was not simple (that is, maintain current preferred email address, and gain members’ permission before adding their name to another mailing list). The original UARA email account was at Dakotacom.net and both the email address and the website were moved in summer 2012 – the mail account became uara@arizona.edu and runs on a UA server. The website continued as uara.arizona.edu.

**Surveys and Feedback**
In the early years surveys were provided in the last newsletter edition for the year. These responses provided guidance for program and newsletter content but also gave reasons to revise the bylaws and constitution several times. The most used technique, which is still used, was to have a survey inserted in the newsletter once a year or other periodic surveys. On occasion there were “focus groups” to get invited members to identify issues and new ideas. Also occasionally there were “Survey Monkey” questionnaires for online completion (and twice in traditional paper copy version at luncheons). The surveys and Advisory Council meetings served as the primary means of gauging member feedback.

Member surveys were included in the spring issue of the newsletter in 1997 and from 2000 to 2012. Since then periodic surveys have been done at some lunch meetings or using an on-line questionnaire (twice). In most cases the number of responses was about 50, regardless of the method (at a meeting, in the newsletter, or online). A different type of survey was done once in 1987, which was a survey of 49 state universities on the topic of how to subsidize health costs for retirees.

**Brochures and Logos**
The first brochure was in 2002 and was one color on folded legal size paper (8.5 x 14). In 2008 Leonor Benitez worked with UA Biomedical Communications to develop a logo and an attractive brochure.
The first logo in 2008 was designed by UA Biomedical Communications with Leonor Benitez heading the effort. This coincided with developing a more modern brochure. The second logo was in 2015 and was designed by the Graphics Unit in the Office of University Relations. Both logos are multicolor and are viewable in color with the online version of this document; other versions of the report have the logos printed in black on white paper.

9. Working with Other Retiree Groups

Histories of ASU and NAU Retiree Associations

The UA had the first university retiree association in Arizona but had not published a booklet of the history, with the result that the time since 1993 had not been summarized. There is a listing of all UA Peer Institutions (as defined by Arizona Board of Regents) at http://uara.arizona.edu/university-retiree-associations and in Appendix B.

NAU published a history of 1985-2005 (87 pages). NAU consulted with the UA and modeled its constitution and bylaws after those of the UA. NAU began its newsletter in 1997. See more information at http://www7.nau.edu/naura/

ASU published two books: A Decade of Success, 1991-2000 (94 pages) and A Second Decade of Success, 2001-2011 (119 pages). The ASU Retirees Association has some support (physical space and staff) from ASU, has a faculty “emeriti” group (not uncommon in university retiree associations) where there is an association of emeritus faculty (http://emerituscollege.asu.edu/FEA.html) and an Emeritus College (http://emerituscollege.asu.edu/). The ASURA operates by a Board of Directors (where all are elected). ASU also has a large “video history project” and both history books are online. See more information at https://asura.asu.edu/

Arizona Statewide Coalition

In the early 1989 to late 1990 there was a statewide organization called the Coalition of Active and Retired Employees of the Arizona State Retirement System, or CARE. Past UARA President Howard Greenseth was the CARE Chair for much of its existence. The group was broadly based, as noted in it name, and was active in areas related to retiree issues before the Retirement Investment Advisory Council of the Arizona State Retirement System, and the Arizona Legislature. The CARE group disbanded once a new law was passed that disallowed funding for this type of organization using ASRS funds.

There was also an Arizona Universities Retirees Council formed in 1991, whose purpose was to represent the mutual interests of the retirees’ associations at the three state universities and to communicate their concerns
to legislators, state government agencies, university administrators, and other groups affecting the welfare of retired persons. This was disbanded some time ago but the date was not found.

The current Tri-University Retirees Association is composed of ASU, NAU, and UA. It meets annually at ASU and the cost of the lunch and other expenses is rotated among the three universities (the host university). The host determines the meeting date and develops the agenda. There are normally three people from each university attending.

**Valuing the Views of University of Arizona Peer Institutions**

The UA has 15 peer institutions and their retiree associations are a reference source for comparison for UARA peers. This provides a method of benchmarking progress and programs and for exchanging ideas. See section below for survey feedback from peers and Appendix B for list of peer institutions.

In June 2015 UARA surveyed its peer institutions to see how it compares on two questions. Ten of the 15 peers have retiree associations that include both faculty and staff and two that have no retiree associations to contact. The two Arizona universities (ASU and NAU) were added for a total of 12 possible responders. Ten responses were received. Two did not respond so the return was 83% (10 of 12).

The questions were:
1. Is your membership increasing, remaining about the same, or decreasing?
2. What is the one activity that you do that is most valued?

Responses regarding member changes over the years:
- Membership is slowly growing or growing steadily: 5 responses
- Membership stays about the same: 2 responses
- Membership dropped for a while and now stays about the same: 2 responses
- Membership is slowly declining: 1 response

The common themes for member growth from those responding universities include:
- The university provides support in the way of office space. The retiree organization generally but not always provides the staff (paid or volunteer).
- There is a very close working relationship with the retiree organization and the university Human Resources department. This includes the retiree organization being involved in pre-retirement efforts by the Human Resources department or programs by the benefits component of Human Resources, and active recruiting for new members early in their retirement process.
- Offer programs that are of interest to significant numbers of members as identified through surveys, discussions and program attendance growth.

The types of activities most valued by the same peer institutions include:
- Monthly educational programs (on- or off campus). Events may include luncheons (with a program just prior to lunch). Topics of greatest interest include: financial/investment/retirement benefits, legal issues, housing, health, exercise and technology.
- Pre-retirement and post-retirement transition workshops.
• Lunch programs for socialization. They may include special interest topics (most often health and investments related).

• Annual update (by university benefits office) on changes in health insurance programs.

• Topical groups such as travel (and travel opportunities), dining, visiting local attractions.

**Management Structure of Peer Institutions**

The 15 official UA peer institutions vary in how they deal with their retiree associations. Of the 15, two do not have a retirees association and three of the 15 are for faculty only. Removing these from the list gives 10 associations for UARA comparison. Of these 10, one has an Executive Committee (9 members) as the governing body and all the rest have a Board of Directors. A full listing of UA peers is in Appendix B.

Some have ex officio members (e.g., representatives of relevant campus organizations that are given “honorary member” status during their term) as board members and most have 12-15 regular board members.

NAU is not a UA peer so it is not listed above, but it is structured like UARA (Officers and Advisory Council, although they are in the process of revising their bylaws); ASU is not a UA peer but it has a Board of Directors.

10. **Personal Reflections by Members**

Ten personal reflections are from members that represent diverse types of UARA involvement during different time periods. The participants were selected so they represent different experiences and perspectives. Their only guidance was to restrict remarks to about ¾ of page. The authors are listed alphabetically and their descriptions are listed in the “Special Acknowledgements” section; all have made substantial contributions to UARA over the years.

**Reflection 1. Leonor Benitez, Human Resources from the Outside and Inside**

My association with the University of Arizona Retirees Association (UARA) began before I became a retired member. As an employee of Human Resources, formerly the Personnel Department, I attended Advisory Council Meetings as a liaison person from Human Resources. I collaborated with Mr. Robert Stirling, Editor of the Jubilacion retiree newsletter, regarding benefit issues. As Human Resources Coordinator, I was responsible for meeting with employees who were contemplating retirement. I assisted them by navigating them through every aspect of the process. I was also responsible for creating various pre-retirement programs and conducting half-day retirement workshops utilizing various presenters from the University and the Tucson community. These workshops proved to be very beneficial and were very well received.

Upon retirement, I became an active member of UARA. I have chaired various committees on the Advisory Council providing benefits updates and as Program Committee Chair, coordinating programs regarding health education topics, and ASRS seminars such as identity theft. I also served as Pima Council on Aging (PCOA) liaison. When I see the UARA logo, I take pride that, with the assistance of the Arizona Health Sciences Center
Biomedical Communications as well as others, I was an integral part of its creation. However, the role I am most proud of was being a member of the Executive Committee as President Elect. I regret that due to family matters, I was unable to continue my role in this capacity.

As I reflect on my many years with the UARA, I am proud to have experienced the changes from the early stages of its formation to the quality organization it has become today. This did not occur overnight. Rather, it is through the strong leadership of the past and present presidents and the hard working members that made this happen. Take time to visit the UARA Home page and utilize the interactive website, view the quality programs being offered and the first rate newsletter. If you are not yet a member, I urge you to become an active member of this great organization.

Reflection 2. George Evanoff, My UARA Memories

I was invited by UARA President Jan Murphy to attend the Advisory Council meetings and report on the activities of the Governor’s Advisory Council on Aging and the Pima Council on Aging. I updated the Advisory Council members on these organizations’ activities, plans and programs. Those meetings were well attended and included a variety of reports given and discussions of issues affecting the UARA. Also in attendance were representatives from university employee organizations who reported on their activities and plans. This was an excellent way of keeping abreast of their activities and campus happenings.

Our luncheons were well attended giving us an opportunity to visit with old colleagues. Also, the education programs allowed attendees to see other friends who did not attend the luncheons. We had varied and informative education program presentations given by individuals well known in their field. Included were Dr. Eric Reiman, Banner Health, and Al Kazniak, Psychology Department Head, on Alzheimer’s Research; Dr. Gerald Swanson, Professor of Economics, on Economic and Fiscal Policies; Lydia Baker, PCOA, on Medicare and State Health Insurance; and Paul Matson, ASRS, reporting on ASRS.

The By Laws and Constitution underwent a major revision and were approved, headed by Dr. Cornelius Steelink. Under the guidance of Dr. Roger Caldwell we reviewed our communications structure. That resulted in an updating of our newsletter and revamping of our web page.

Pat Williamson, our Office Manager retired (again). She had done a wonderful job for us and was the “face” of UARA to many of our members. Jo Henry decided it was time to relinquish the rigors of the Membership Chair which she had handled for many years. We all appreciated the fine job she did. We hired Trudy Jacobson as Office Manager with membership duties. She has done a yeoman’s job.

It has been a rewarding experience working with our members and officers. I thank you for the opportunity.

Reflection 3. Susan Green, Education and Enlightenment was my Joy (and still is)

It took me ten years after I retired in 1998 to get the itch to reconnect personally with the University. A good friend of mine, Professor John Guilbert (Geosciences), was serving on the UARA Advisory Council at the time as a representative and member of OLLI (Osher Lifelong Learning Institute, the senior learning program affiliated with the UA). I was also active in OLLI, so as John was moving on to other things, I stepped up to fill his shoes (and they were big shoes). George Evanoff was President then, and he invariably called me Deefendorfer, a corruption of the name he had known me by years ago. I began by writing up OLLI class dates
and sample curricula for the newsletter *Jubilacion* and attending the monthly Advisory Council meetings. I liked being among staff and faculty again and watching the featured presentation each month by some interesting campus program. By the end of the first year, I was more in tune with campus life than when I was working there!

In time OLLI was removed from the list of “reports,” but I found another niche as Education Chair in 2010. I was responsible for putting together the twice-a-year educational lectures that UARA provides to a loyal following of members. At the same time, I was interviewing alumni of all sorts and writing the “Whatever Happened to….?” column in the newsletter.

It was a good time to serve on the Advisory Council: Roger Caldwell was in the midst of a major overhaul of the website, bringing it into the 21st century, members were getting moved off paper and onto email, and Jan Murphy began upgrading our newsletter. There were plenty of new ideas popping up on how better to serve our membership. After a couple years, I was ready to do my own “move on,” and with the energetic Trudy Jacobson installed as the UARA Office Manager, I knew I was leaving the group in good hands!

**Reflection 4. Howard Greenseth, Working with State Agencies and the Legislature**

My work with the UARA is covered, for the most part, in the UARA history sections referenced in this booklet. However, I would like to add some personal reflections. Legislative members, including Dr. David Smith, Dr. Robert Letson, Dr. Irving Yall and myself would meet at the U of A garage to pick up a car for our monthly drive to Phoenix to attend ASRS board and committee meetings. We would, well ahead of the Arizona legislative year, meet with a number of legislators to inform them of our ideas. Even then many of the key committee members were Republicans; we would have friendly discussions and they would tell us what they would like to do and what they would not do.

As a side note I called to reserve a car, which we did through a vice president and was told by the secretary that the new VP handling this said there would be no more vehicles available for retirees. So I made an appointment with President Koffler and brought him up to date on our activities. He picked up the phone and as a result we picked up the car as usual the following day. This was just one example of the personal relationships that were formed by Association volunteers. Gradually meetings with legislators became more difficult to secure and public meetings for citizens to offer ideas for upcoming bills were not held, were canceled at the last minute, or were announced only hours before they convened. Now there are few if any public committee sessions openly held on all legislation so citizens can air their views.

We did not have many of the communication devices that people use today, but in retrospect it forced us to meet personally at lunch or in little groups in addition to formal meetings. This helped to form personal friendships that benefited the retirees organization. Because of the wide range of UARA, retired from most UA departments, we were always “in the know” about the greater university family.

**Reflection 5. Jo Henry My Time as Membership Coordinator 2000 - 2011**

I have many fond memories of my eleven years as Membership Coordinator of the University of Arizona Retirees Association and of the many amazing and dedicated people: faculty, staff and academic professionals with whom I worked on the UARA Advisory Council.
When I was asked to join the Advisory Council in 2000 and assume the duties of Membership Coordinator, I really didn’t know what to expect. It turned out to be a challenging and most interesting endeavor. The archival and current member records through 1998 were kept in two metal boxes, in alphabetical order on 3 x 5 cards with name, address, and years of membership hand written. For 1999 I was given a computer typed list in random order of those who had joined that year with life members highlighted. Also membership material that had accumulated over a period of time was given to me in a cardboard box. It was quite a time-consuming process to work through all those bits and pieces.

The year 2000 marked the beginning of the automation process of the UARA membership list. From this data base, all pertinent information on each dues-paying member that year was entered into the system, and I was able in future years to identify new annual and life members, document returning members and identify those members who had joined the prior year but who had not renewed for the current year. I was able to do all types of statistical reports, which I did on a monthly basis for reporting purposes to the UARA Advisory Council. Also by knowing who had been a member the prior year but who had not yet renewed for the current one, myself and two other advisory council members were able to call or leave messages for these retirees urging them to renew their membership. These lists were over 200 long and most were happy for the reminder.

If any corrections were noted upon updating the membership list, I sent a separate list to Systems Control at the UA, listing the old and new address for updating their master University of Arizona Retiree file. By perusing the obituaries of Arizona Daily Star and the families of deceased retirees reporting to me either by mail or in person, I also sent lists of these occurrences throughout the year to Systems Control for updating their master file.

Also, each year after the huge mailing of over 3000 dues letters, I received countless numbers of return mail of retirees who had either moved and left no forwarding address or the forwarding address had expired, or with forwarding address indicated which meant the dues letter had to be resent. Again all these corrections had to be sent to Systems at the UA for correction of their master file.

As I said above I have many fond memories of those eleven years as Membership Coordinator and much admiration for those individuals past and present who have served or will serve on the Advisory Council and who have donated or will donate their unlimited time and effort to the success of the Association. All of us UA retirees should be most grateful for the commitment of these very dedicated individuals, faculty, staff, etc. because if it weren’t for them the University of Arizona Retirees Association would cease to exist.

Reflection 6. Stardust (Dusty) Johnson, A Revelation

The significance of UARA was totally unknown to me when Jo Henry, longtime membership chair, invited me to an Advisory Council meeting many years ago. At that time, I was unaware that important retiree benefits were the result of the vision, hard work and achievements of retirees who preceded me—retirees who didn’t have those same benefits when they retired. Becoming active in the organization was a revelation, shattering a naiveté I might have had about assumed retiree benefits—such as the security of the pension fund, continuing health care options, library privileges, parking privileges, etc. I quickly became a believer in the importance of UARA as the only group that spoke for and was committed to protecting and increasing benefits for retirees. UARA was—and continues to be—committed as well as diligent in keeping tabs on the legislature and interacting with the University administration.
I quickly became involved and served two terms as secretary, two terms as vice president during the amazing Corny Steelink’s two terms as president and served a single term as president (2005-2006). During these years, I had the good fortune of working with colleagues dedicated to the welfare of U of A retired persons—colleagues such as Keith Meredith, who was vigilant in keeping tabs on legislation, pension funds, and health care issues.

During my presidency, we determined we could afford to hire a part-time office manager and we had the good fortune of hiring the late Pat Williamson. She became the positive and organized public face of our organization and our office on Speedway Blvd. Trudy Jacobson, the exemplary successor to Pat, now serves UARA in expanded, multitudes of ways.

UARA has demonstrated commitment to the University with the awarding of more than 20 undergraduate and graduate scholarships beginning with the first Irving Yall Book Scholarship in 2004. Corrine Wilson was passionate in pursuing that first award. In addition—and importantly—Tom Rehm and Suzanne Van Ort have endowed two additional scholarships. I served as Scholarship Chair for several years and continue on the committee, which is now chaired by Betty Atwater.

Reflecting on the past fifteen years, I remain impressed with the dedicated commitment of UARA colleagues who have worked diligently on behalf of others in so many capacities—educational seminars, newsletters, luncheons, phone tree, scholarships, website (thank you Roger Caldwell!!), interaction with Human Resources, keeping tabs on legislation, tri-university meetings, etc., etc. The importance of their achievements can hardly be quantified. Each of us is indebted to those who have preceded us. Their achievements were and continue to be significant. I am grateful to be a member of the University of Arizona Retirees Association.

Reflection 7. Janice Murphy, Life as a long time Newsletter Editor, 2003-2012

A passionate regard for the safety of my pension caused me to seek out the University of Arizona Retirees Association upon retirement in 1999. I understood that UARA members had spent countless hours traveling back and forth to the Legislature in Phoenix in the early 90s and together with others were successful in passing legislation that protected the pension fund from inappropriate uses. I also knew that vigilance was necessary for the continued protection of UA retiree benefits and had an awareness that this was the ONLY organization besides ASRS that served that purpose. I served two terms as president: 2002-3 and 2006-7. When Fran Janssen resigned her position as Jubilacion editor in 2003, I assumed that post and together with the talented Jean Discorfano edited the newsletter for nine years.

What I gained were priceless friendships (strengthening old and gaining new) and respect for those who contributed precious time and talent for the benefit of retirees. Jo Henry and Corinne Wilson were vigilant in increasing our membership numbers. Jo’s records were impeccable and the university relied on them in updating lists for new addresses or deaths. Corinne worked diligently to get the Irving Yall Book Scholarship established. Betty Snider coordinated retiree volunteers to fill part-time university positions open due to budget cuts. We created ties with sister organizations: UA Elderhostel, SAGE (now OLLI), OASIS, Roads Scholars, Humanities Seminar Series, and UA Life and Work Connections.

We moved in 2003 from half a shared run-down house (now Biological Sciences site) into a beautiful new office in the Sun Building. Wally Beene, Journalism, answered UARA phones and used the office for his work space for years, an arrangement that benefited both.
In spring 2005, as an experimental inexpensive entertainment for member participation, Jo Henry and I coordinated a barbecue in Ft. Lowell Park. We did this for two years and had fun. Beyond notice, Jo did her usual telephone outreach and there was a good crowd from Student Services as well as from other areas. Jo and her husband lugged many bottled waters, soft drinks and ice containers and deserve credit for its success.

UARA cosponsored a first with Human Resources in 2006, a well-attended on-campus seminar featuring ASRS Director Paul Matson. We began inviting campus speakers to Advisory Council meetings to provide educational updates. It proved to be an excellent way to keep in touch with the University. In January 2007 UARA was 1000 members strong. Through the years we diligently guarded our independence to enable us to speak strongly on behalf of retirees.

We move on with our lives with good memories and the hope that others will see the value of the UARA connection and will carry it forward.

**Reflection 8. Gladys Sorensen, From UA Dean to UARA Secretary**

My early memories include Kay Mason (College of Nursing) being the third president of UARA. When I retired in 1988, I joined UARA and eventually became a life member.

My recollections include the luncheon meetings and the time I was on the Advisory Council. The luncheons provided an opportunity to catch up with the other retirees. The entertainment included programs such as: School of Music student presentations; dancing by Albert Mead (well known for his research with snails) and his lovely wife; and information on the state of the University from various administrators.

During Beverly McCord’s (College of Nursing) presidency I served as secretary. Beverly always started each meeting with a joke about aging, a precedent set by Raymond Klein. I was on the Advisory Council when Herb Abrams (College of Medicine) was president. We discussed meeting with ASU and NAU retirees about benefits. Advisory Council members traveled to Phoenix to meet with legislators. After twenty-seven years of retirement, I feel the Advisory Council is still working for the retirees and supporting the University and its students.

**Reflection 9a. Cornelius Steelink, My Memories of Our First Office.**

It was a small room in an old house at 1211 N. Warren Avenue, Tucson. UA President Henry Koffler had donated it to the UARA in 1991, free of charge. Adjacent to the small room was a conference room, which could seat six to eight people. The University of Arizona used the conference room for meetings and exams. We could use the room if we scheduled it with president’s office.

I first started visiting the office in 2001, as part of my Telephone Tree work. Jency Houser (Yall) was already the volunteer office manager. Over the years she had collected a desk, chairs, file cabinets, a copying machine, a radio and TV set, telephone and an AC window cooler. The telephone and answering machine were underwritten by a grant from the Sparks Endowment. The address was a P.O. Box Number. Of course, the most important asset was the UARA membership list, all of it on 3x5 cards.

Jency kept the office open from 10-2 PM Mondays through Thursdays and 10-noon on Fridays. All told, 23 UARA volunteers took turns staffing the office; in any one week, seven members were always available. For an entire decade, this venture had been sustained by volunteers.
One interesting part-time resident of the conference room as L. D. Clark, emeritus professor of English. Clark was a nationally known author of 14 novels and was still writing at the time I was there. The conference room was his hideaway for creative writing. When he was there, Jency always made sure that there was absolute quiet for the famous author: no radio, no loud talk, no slamming doors. But to his credit, he also offered to volunteer for office duties, in return for our silence.

Reflection 9b. Cornelius Steelink, My Memories of Our Telephone Tree.

Here is how the Tree worked.

When the head of the Tree was informed of an important legislative bill, he (she) would immediately contact eight to ten “captains.” These “captains” each had five to six volunteers on his or her list, who would be responsible to contact a legislator. The head of the Tree would make a short summary of the bill to share with the “captains.” Tree members were asked to telephone or write their legislators. Ideally, 50 to 60 contacts would be made in a very short time period. For some years, this advocacy effort was quite effective. It persuaded the Legislature to pass a 5% COLA for retirees and a health insurance benefit. It also prevented the passage of a bill that would have diverted $70,000,000 from the Arizona State Retirement Fund to a venture capital investment scheme. There were other successes, also.

However, maintaining an active group of volunteers year after year proved to be a challenging task. I remember working with Jency Houser in our tiny office, scanning our membership list and selecting names to replace a dwindling group of Tree volunteers. By 2005, the Tree had been abandoned.

The age of phone-calling volunteers may have passed into history.

Reflection 10. Suzanne Van Ort, The People made it a Pleasure

Recollections of my experiences focus primarily on the people who make UARA a strong, vibrant organization for retirees. In 2006, I began attending Advisory Council meetings at the invitation of Keith Meredith. Janice Murphy was then President and her leadership was evident in the accomplishments of UARA. After attending only three Advisory Council meetings, I was surprised to receive a telephone call from Helen Mautner, on behalf of the Nominating Committee, asking me to be a candidate for UARA president. Helen was persuasive and assured me that UARA had strong leaders who worked as a team and would be supportive of my leadership. As usual, Helen was correct! Everyone willingly gave of their time and talents in helping UARA move forward.

Several significant accomplishments stand out in my recollections. The efforts of our Office Managers are the strength of UARA. The late Pat Williamson organized the office and represented UARA well in responding to questions from retirees and about UARA. Her successor, Trudy Jacobson continues to represent UARA in an outstanding manner. She serves in many capacities for UARA, such as newsletter editor, membership coordinator, and communicator with multiple individuals and units both on-campus and in the community. Speaking of the newsletter, in fall 2012 we launched a revised newsletter. The long-standing UARA newsletter, Jubilacion, under the editorship of Janice Murphy, provided a strong foundation for the revision. The new UA Retiree News, available both in hard copy and on the UARA website, has been well-received and evaluated by readers as excellent! The website, under the leadership of Roger Caldwell as webmaster, provides a great communication vehicle for retirees and others interested in UARA.
In providing educational programs to benefit retirees, UARA has offered a variety of seminars on issues related to the elderly, health care, scams and fraud, as well as valley fever in people and pets. The diversity of programs and their availability to retirees and the public is an accomplishment. Collaboration with TMC Senior Services and with Pima Council on Aging extends the reach of UARA programs into the community. Another recent accomplishment of UARA has been the work of the Activities Committee. Through this Committee and often in collaboration with the UA Visitor Center, several tours and attendance at athletic events have been offered each year. This past year, under the leadership of Committee Chairperson Jim Barrett, a tour of the new SunLink streetcar was highly successful with fifty people enjoying the ride and tour of the maintenance building.

My recollections would not be complete without acknowledging the many members who continue to support UARA and recognize that UARA exists to serve retirees. I am honored to have served and benefited from the personal relationships that are the foundation and strength of UARA.

11. How Time has Changed the UARA

There have been many changes over the last 35 years in the external environment but also in the characteristics of UARA’s members and prospective members. The most important issues and the ways of addressing them also changed over time. Some of these changes are in the type of audience, the critical issues over time, and the ways of communicating. Different university retiree associations have reacted (or not reacted) to these changes in different ways. There is no single approach that is best for everyone.

The Audience is not Homogeneous
People retiring in 1980 at age 65 would be 100 in 2015. Today’s older retirees (e.g. retiring before 2000) are different from more recent retirees (e.g., retiring after 2000). Some people left the university happy and had a positive employment experience and some left as a result of budget cuts or reorganizations. Others had a portion of their career at another institution (universities or other). Some retired relatively young, some as relatively old, and others at the “normal” retirement age of age 60-70. It is likely that not all these subgroups expect or want the same things from an organization like UARA.

The Critical Issues are not Constant
In the 1980s there were important issues that have now faded into the background. Retirement options, medical coverage, and cost of living payments, are all different today. Many academic disciplines have become more subdivided and some more integrated. Administrative roles have become more automated. Vastly more data of all types is within easy reach.

The Ways of Communicating are Changing and are Integrated
In 1980 there were a few isolated electronic mail systems; one had a separate account for each major function (academic computer center, administrative data, each federal agency, and your personal email account). Each had its own log-in and password. By 1990 there was a single electronic mail system but no world wide web. By 2000 the campus had been transformed to allow for ease of communication in and among all administrative units. In the late 1990s cell phones and personal digital assistants arrived and were largely replaced by smart phones in the 2010s. These new electronic means of communication functioned not just for the work environment but also for our personal environments. Suddenly everyone could talk to everyone else, quickly and cheaply. Compared to how UARA functioned in 1980, when UARA began, new retirees find themselves in
a different world. They are less dependent on socially related groups for pleasure and information than retirees in the past. Current retirees may have contacts through many varieties of “social networking” options, have access to all types of relevant information instantly and find what they want with ease.

**UARA Visibility is Changing**

In the early days of UARA (1980 - 1999) the UA was a smaller place, more people knew each other, and this carried over into the retirement phase of their lives. Today’s retirees have much on their mind – financial well-being, leisure time, travel, learning, and they may not want to join a “retiree club” as they still have a lot to do on their own. But factors such as this affect our visibility to new retirees and that seems to be less visibility than in the past.

**External Changes Require Changes for Organizations like UARA**

We are still reviewing the changes and what that means for UARA. But, like the basic transformations of its members, organizations must change with the times. For example two long-standing UA organizations were faced with declining memberships and closed in 2015. The UA Faculty Women’s Club promoted friendship and fellowship among wives of the UA Faculty and related personnel. The UA Beta Group was a university-wide networking organization of staff and office personnel.

Other examples include local chapters of national fraternal or community service organizations, or recreational country clubs. Many of these groups are actively evaluating and planning for the organization of the future – what to offer, to whom, and under what conditions. The successful ones have transformed themselves to retain some of the key principles but make major changes in functions and activities. Some of our peer institutions have made successful changes that are relevant for their environment.

We also know that more of today’s retirees have their own agenda for retirement, so they have less need for joining one of the retiree-focused associations. However there are still programs for retirees that are well attended at universities that are similar to the University of Arizona.

**12. Perspectives on Our Future**

**A View from the Early Days**

In its early days the UARA grew rapidly. Members needed relevant and accurate information regarding retirement matters. At that time the university was smaller and more people retiring knew each other. Also at that time that time were no layoffs that soured some people when forced to retire. Now, the university is a big place, fewer recent retirees know a lot of others retiring, and everyone is busy doing other things in their life. Many other “social organizations” and a few university retiree groups have seen declining membership; some have stabilized at a lower membership level.

Other factors include a shorter tenure of UA presidents in recent years resulting in more frequent presidential turnover along with different priorities and staffing needs. Finally, people are changing careers or employers more often; when they retire they’ve had multiple, shorter term careers often in many places and don’t have the strong connection they would if they had worked for the same employer for 30 years.

**Transforming the Organization**

How will changes affect UARA? How can we take advantage of the changes? What can we learn from other retiree groups? What are our options?
Around 2000 many things seemed to change; there were perturbations in membership numbers, followed by a trend of fewer members, and, the UA Human Resources Department stopped supporting the newsletter printing. Perhaps it was the widespread acceptance of new information technologies that effectively lets anyone talk to anyone anytime. Perhaps it is the increased difficulty in finding members that are willing to serve as officers (that is about the time presidents began serving multi-year terms). Possible reasons include the ease of communications and sense of belonging that the information technologies brought, the higher turnover of senior management, the changing work environment due to different leaders, the different changes in the role and focus of the university, or some things that have not been discovered yet.

The UARA is probably in a major transition period. The historical summary for the last 35 years could be used as the basis for a transformation study. Knowing the types of audiences that now exist, and their wants and needs are a first step. Knowing how similar organizations have successfully navigated this change is also useful knowledge. The first step was to write the history so we better understand the changes underway. The next step is to transform ourselves, with appropriate care and analysis, to welcome the future.
Appendices

Appendix A: UARA Officers by Year

The Vice president title existed beginning in 1990 and lasted until 2011 when it was changed to president-elect. A change in bylaws to take effect in 2016 changes the president-elect back to vice president and requires the election of six members of the Executive Committee for three-year terms; the Executive Committee then elects officers from among the committee each to one year terms. Two names in a slot indicate both served.

<table>
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<tr>
<th>Year</th>
<th>President</th>
<th>Vice Pres/Pres Elect</th>
<th>Secretary</th>
<th>Treasurer</th>
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<tr>
<td>1980-81</td>
<td>George Sparks</td>
<td>David Hall</td>
<td>Rachael Maynard</td>
<td>Lois St. Pierre</td>
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<tr>
<td>1981-82</td>
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<td>Rachael Maynard</td>
<td>Lois St. Pierre</td>
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<td>Katherine Mason</td>
<td>Frank Chambers</td>
<td>Marjorie Graham</td>
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<td>Darrel Metcalfe</td>
<td>Kathryn Dunlap</td>
<td>Meta Anderson</td>
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<td>Darrel Metcalfe</td>
<td>Robert Svob</td>
<td>Rita Mikula</td>
<td>Meta Anderson</td>
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<td>Robert Svob</td>
<td>David Windsor</td>
<td>Rita Mikula</td>
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<td>1986-87</td>
<td>David Windsor</td>
<td>Howard Greenseth</td>
<td>Amy Jean Knorr</td>
<td>Vivian Stumpf</td>
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<td>1987-88</td>
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<td>June Morrison</td>
<td>Amy Jean Knorr</td>
<td>Dorothy DeMiller</td>
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<td>1988-89</td>
<td>William Foster</td>
<td>Newell Younggren</td>
<td>Vera Minnick</td>
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<td>Newell Younggren</td>
<td>Edgar Louttit</td>
<td>Irving Yall</td>
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<tr>
<td>1990-91</td>
<td>Jency Houser</td>
<td>Frances Hammer</td>
<td>Irving Yall</td>
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<td>1991-92</td>
<td>Frances “Sledge” Hammer</td>
<td>Irving Yall</td>
<td>Corrine Wilson</td>
<td>Wayburn Jeter</td>
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<td>James Witner</td>
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<td>1993-94</td>
<td>Jim Witner</td>
<td>Raymond Klein</td>
<td>Blanche Seferlis</td>
<td>L.W. Dewhirst</td>
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<td>1994-95</td>
<td>Raymond Klein</td>
<td>Beverly McCord</td>
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<td>Corrine Wilson</td>
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<td>1995-96</td>
<td>Beverly McCord</td>
<td>Herbert Abrams</td>
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<td>1996-97</td>
<td>Herb Abrams</td>
<td>John Crow</td>
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<td>Corrine Wilson</td>
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<td>1997-98</td>
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<td>Sorensen/Mautner</td>
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<td>1998-99</td>
<td>Francis &quot;Sledge” Hammer</td>
<td>Keith Meredith</td>
<td>Helen Mautner</td>
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<td>Robert Baker</td>
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<td>Stardust Johnson</td>
<td>Corrine Wilson</td>
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<td>Stardust Johnson</td>
<td>Dianne Bret Harte</td>
<td>Corrine Wilson</td>
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<td>2004-05</td>
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<td>Stardust Johnson</td>
<td>Bret Harte/Snyder</td>
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<td>Stardust Johnson</td>
<td>Robert Sankey</td>
<td>Helen Mautner</td>
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<td>2006-07</td>
<td>Janice Murphy</td>
<td>Robert Sankey</td>
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<td>Fenita King</td>
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<td>2007-08</td>
<td>Suzanne Van Ort</td>
<td>Leonor Benitez</td>
<td>Fran Tickner</td>
<td>Fenita King</td>
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<td>2008-09</td>
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<td>George Evanoff</td>
<td>Fran Tickner</td>
<td>Tom Rehm</td>
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<td>2009-10</td>
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<td>Tom Rehm</td>
<td>Rose Perrill</td>
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<td>Tom Rehm</td>
<td>Rose Perrill</td>
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<td>2013-14</td>
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<td>Tom Rehm</td>
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<td>Ruth Eskesen</td>
<td>Nancy Shiley</td>
<td>Tom Rehm</td>
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<tr>
<td>2015-16</td>
<td>Ruth Eskesen</td>
<td>James Barrett</td>
<td>Felicia Hermann</td>
<td>Tom Rehm</td>
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</table>
Appendix B. UARA Peer Institutions

This list of peer universities was developed by the Arizona Board of Regents in the 1980s and last updated in 2009. It is used to compare each Arizona university with a set of “similar” universities for that university. This list is used for benchmarking many measures that can be compared across the various universities. For us it is a convenient method of comparing the different retiree organizations with UARA as they are from “similar institutions.” The peer listings differ for each of the Arizona universities. This list, with links, is on the UARA website.

There are 15 universities plus the three Arizona universities listed. Ten of the 15 institutions have associations that include both faculty and staff; those ten plus ASU and NAU were sent survey requests. Ohio State and Penn State did not respond, so total responses were 10 of 12 (83%) The UA is not included in the analysis. Data are summarized without listing any university by name.

ASU Retirees Association asura.asu.edu/
NAU Retirees Association www4.nau.edu/naura/
UA Retirees Association uara.arizona.edu/
Michigan State Retirees Association www.msu.edu/~msura/
Ohio State Retirees Association hr.osu.edu/osura/
Penn State Retired Faculty/Staff Club www.psu.edu/org/retfsclub/
U California, Davis Retirees Association ucdra.ucdavis.edu/
U California, Los Angeles, Retirees Association www.retirees.ucla.edu/
U Iowa Retirees Association www.uiowa.edu/~uira/
U Minnesota Retirees Association www1.umn.edu/umra/
U Texas Retired Faculty-Staff Association www.utexas.edu/rfsa/
U Wisconsin Retirement Association uwra.wisc.edu/
U Washington Retirement Association depts.washington.edu/retiremt/uwra/

Institutions below this line are UA Peers but not UARA Peers (no association, faculty only or system-wide retirees association)

Texas A&M University * For faculty only
U Florida Retired Faculty Organization * For faculty only
U Illinois (state universities retirement system) * Combines all campuses
U Maryland Retirees Association * For faculty only
U North Carolina (Chapel Hill) Retired Faculty Association www.unc.edu/uncrfa/about.shtml
Special Acknowledgements

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Roger Caldwell is Professor Emeritus of Soil, Water and Environmental Science and former Professor of Communications. He served in a variety of central administration positions, university-wide committees and the Faculty Senate. Examples include Special Assistant to Provost, Special Assistant to the Dean of the College of Agriculture and Life Sciences, University Energy Coordinator, Coordinator of University Information Systems and Communications, Member of Regents’ Task Force on Excellence, Efficiency and Competitiveness, and member of Arizona Universities Redesign Study. He served on the UARA Communications Committee and Bylaws Committee and was a member of the Advisory Council. He retired from the UA in 2003 after 37 years of service. Trudy Jacobson is UARA Office Manager, Membership Coordinator and Newsletter Editor. She was a staff employee at the Office of Public Information of the Division of Biomedical Communications at the Arizona Health Sciences Center. She retired from the UA College of Medicine in 2003 after 30 years of service.

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Contact Information and Extended Interviews
The University of Arizona Retirees Association is located at the Babcock Building on the University of Arizona campus – 1717 E. Speedway, Room 3105. The website is at http://uara.arizona.edu, and the email address is uara@arizona.edu.

Extended Interviews
Several people were interviewed for their descriptions of events or insights to explaining some historical events. These interviews were done by Roger Caldwell and George Evanoff. Interviewed were: Leonor Benitez (Human Resources), Marty Kilhullen (Manager of Benefits), Keith Meredith (Gerontology Program, former member of ASRS Governing Board and former UARA President). Additional interviews were done by Roger Caldwell and include Jo Henry (Registrar’s Office and former UARA Membership Coordinator), Cornelius Steelink (former UARA President and member of current Advisory Council), and Howard Greenseth (former UARA president and author of the 1980-1994 UARA History).

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