

## **History of the University of Manitoba Retirees Association**

### **Formation**

In early 1996, Dr. John Steele approached John Mundie to be the retirees' representative on the 1996 University of Manitoba United Way Campaign as his replacement. John Mundie agreed and to help him fulfill this responsibility, he got together several other retired persons who had served in various positions at the University. They were Dr. Helen Glass, Dr. Bob Hudson, John Markham, Ms. Vera Moroz, Dr. John Steele, Dr. Steve Stothers and Ms. Edith Williams. Ms. Bernice Furlong joined the group later in the year. The group took on the name **Retirees' Committee**. During its first meeting, the members discussed what other things might be done to maintain the interest of retirees in the University. As a way of determining this, it was proposed that a questionnaire be sent out to retirees.

Coinciding with this development was the appointment of Dr. Emöke Szathmáry as President and Vice-Chancellor of the University. Based on her experience at other universities, she expressed her interest in bringing retirees into closer contact with each other and the University. Bob Raeburn, Director of University Relations Division, was assigned the task of exploring how this could be achieved. As he was aware of the informal group of retirees, he asked Julie Mikuska, Assistant to the Executive Director, to work with the group on this assignment. This arrangement provided retirees with a direct link to the University, its administration and resources.

### **President's Reception**

The Retirees' Committee concluded the best way to begin relations between the University and retirees was to hold a reception to be hosted by Dr. Szathmáry. This would provide them with an opportunity to meet the new president. Dr. Szathmáry sent out 1,300 invitations to retirees living in southern Manitoba. Included with the invitations was the survey developed earlier by the Retirees' Committee. The reception was held on Saturday, February 1, 1997 in the Brodie Centre on the Bannatyne Campus. The program included a presentation by the President and by Mr. Bill Norrie, Chairman of the United Way Campaign of Winnipeg. Following these presentations, there was a tour of the Brodie Centre followed by a reception. The reception was considered to be a great success with 125 retirees in attendance. Because of this it was decided the event should be held semi-annually.

The second President's Reception was scheduled for September 27, 1997, which was the date of the University's Homecoming. It was held in the atrium of the recently renovated Faculty of Agriculture Building on the Fort Garry Campus. Dr. Jim Elliot, Dean of the Faculty, was the featured speaker. A tour of the renovated buildings was held as part of the reception. Although the reception was considered to be a success, attendance was much smaller (40) than at the first reception. It was concluded that the event should not be held in conjunction with any other activity the University sponsored as the two events could be in competition with each other in terms of attracting retirees. As a result, it was agreed to hold the receptions in mid-April and mid-October each year. This has happened ever since.

The location of the receptions has varied until most recently. Sites have included the University Club, the Helen Glass Centre for Nursing, the Drake Centre, and St. John's College. With the increase in attendance at the events to 150 or more, the receptions now are held primarily in the Marshal McLuhan Hall in the University Centre and occasionally at the Brodie Centre.

### **Accomplishments of the Retirees' Committee**

### **Retirees' News**

With the help of John Mundie, Julie Mikuska published the first edition of the *Retirees' News* in June, 1997. The response to the first publication encouraged the Retirees' Committee to continue publishing the News twice a year. In addition to the mail out, current and past issues of the *Retirees' News* may be found on the UMRA website.

### **Supplementary Health and Dental Benefits and Pensions**

For several years prior to the formation of the Retirees' Committee, a retiree from the University was named by the Board of Governors to be a member of the Staff Benefits Committee. Following its formation, the Board agreed that the Retirees' Committee name the retiree member to the Staff Benefits Committee. This Committee reviews the Supplementary Health and Dental Benefit Plans for employees and retirees of the University and makes recommendations to the Board.

Upon joining the Retirees' Committee in January, 1998, Dr. Nora Losey formed a subgroup. Its purpose is to look at the benefits programs from the perspective of retirees, to make recommendations for changes through the retiree representative on the Staff Benefits Committee and the Pensions Committee and to monitor how the programs are being administered. In 1999 it looked at the possibilities for extending supplementary health benefits to retirees after age 75. It was not able to find a viable way to accomplish this. It also looked into how out-of-country travel insurance could be provided to retirees on a group basis. Again, there was no viable solution. In the summer of 2001 the subgroup undertook a survey of over 1,500 retirees regarding their interest in changes to their supplementary health benefits. The survey questionnaire was based on one developed by the Staff Benefits Committee for University employees to determine if there were common interests between the two groups. Almost 590 replies were received. One of the conclusions was the lack of awareness among retirees as to the benefits they currently received. As a consequence, there has been more information made available through the Retirees' News, the web site and mailings. (See Health Benefits.)

### **Other Benefits Available to Retirees**

In addition to the supplementary health and dental benefits available to retirees, the Committee pursued other benefits suggested by some 200 respondents to the questionnaire mailed to 1,300 retirees in February, 1997. Other benefits made available to retirees at no cost include: identification cards which enable retirees to use university services including the libraries and physical education facilities, to have access to computer services, universities courses and seminars, and to obtain home delivery of the Bulletin.

A number of respondents to the survey expressed a desire to meet on a regular basis to listen to a presentation of particular interest to retirees by a distinguished speaker. The majority suggested this take place quarterly. However, if these were to take place on either campus, they wanted to have free parking. The Retirees' Committee felt that this idea was a good one and could best be fulfilled by having it integrated into the President's Reception. This is now a regular feature at the reception and has been well received.

Many of the respondents to the survey indicated they would like to share their particular interests with other retirees. The most frequently mentioned interests were travel, reading, gardening, music, computing and bridge. Recreational activities included hiking, curling, skiing and golf. When the Retirees' Committee asked for volunteers to organize one or other of these interest groups, no one came forward.

### **Establishment of the University of Manitoba Retirees Association (UMRA)**

Early in the formation of the Retirees' Committee interest was expressed in establishing a more formal relationship with the University. Julie Mikuska made contact with several retiree associations affiliated with Canadian universities to learn about their relationships with their respective universities. Contact also was made with retiree associations at Manitoba Hydro and Investors Group regarding their relationships with their organizations. Based on the responses received, it was decided to continue with the informal arrangement that existed until circumstances warranted a change. The University

continued to appoint a liaison person to work with the Committee. In September, 1999, Mrs. Kathy Vitt, Business Officer in Human Resources, replaced Julie Mikuska as the liaison person. In turn, Ms. Rosalyn Howard and Mrs. Barbara Cameron replaced Kathy Vitt in early 2004.

In 2001, the Association of Professors Emeriti at the University of Alberta conducted a survey of Canadian universities and found that 24 had retiree associations. One of the conclusions was to reactivate the formation of a national association of university retiree associations. To this end, a meeting was held in Toronto in May, 2002. Nineteen university retiree associations were represented at the meeting. It was agreed that the formation of a national association should be pursued and a steering committee was established. John Mundie was asked to serve as the liaison person for retiree associations at Lakehead University, the University of Winnipeg, Brandon University, the University of Regina, the University of Saskatchewan and our own association. It was anticipated that the new association, to be known as **College and University Retiree Associations of Canada (CURAC)** would be established at a meeting in May, 2003 in Halifax.

In preparation for the formation of CURAC, a draft constitution was prepared. One of the conditions for a retiree association to become a member of CURAC was for it to be formally established and recognized by its university. Given this condition, it was decided that it was time to seek a formal relationship with the University of Manitoba. Discussions were held with Mr. Terry Voss, Executive Director of Human Resources. The outcome was that on May 14, 2003, he wrote, "I am writing to you to confirm that the University accepts the University of Manitoba Retirees Association as the body authorized to represent all retirees of the University of Manitoba. Liaison with the University shall be through the Executive Director of Human Resources." Thus the **University of Manitoba Retirees Association (UMRA)** was formally established. On May 26, 2003, CURAC was formed and UMRA became a founding member. John Mundie and Nora Losey attended this inaugural meeting of CURAC on behalf of UMRA.

The following year, in May, 2004, UMRA and the University of Winnipeg Retirement Association co-hosted the Annual CURAC Conference in Winnipeg. Delegates in attendance represented retiree associations from 21 Canadian universities.

Submitted by John Mundie, January, 2006.