CHANCELLOR’S LEADERSHIP BREAKFAST
By Dale Neuman

The UMKC Office of Advancement presented the Chancellor’s Leadership Breakfast on August 16, 2012, at the Student Union to a large gathering of community leaders, alumni leaders, UMKC constituent group leaders, faculty and staff. This is now an annual event to update those present on the “state of the campus” and future plans. Among the presenters were Chancellor Leo Morton, Provost Gail Hackett, Vice Chancellor for Advancement Curt Crespino and UM System Vice President for Finance and Administration Nikki Krawitz.

Chancellor Morton led off the session highlighting data about UMKC’s activities in the past year and its involvement in planning for the metro area’s future against the backdrop of the slogan: “There’s only one UMKC.” He noted that there were now 65 organizations officially associated with UMKC that provided more than 2,600 volunteers who contributed 195,000 hours of time in service to the campus. A national organization that tracks such efforts has estimated the value of these donated hours at $4.2 million. Records also show that more than 34,000 people attended UMKC events in 2012. He then spent time reviewing how UMKC fits into the Greater Kansas City Chamber’s “Big Five” initiatives for Kansas City with its missions in the arts, entrepreneurial efforts, and transitioning research into practice in urban affairs, medicine and animal health.

An important part of his remarks dealt with the possible change of name to the University of Kansas City and the research that is being conducted to test the idea. He noted all of the other major urban
state universities which now use only the name of the city in which they are located as well as data showing that most of our students come from this area and stay in this area. He also reported that this area ranks high nationally in philanthropy and that other educational institutions were using their ties to Kansas City to prospect for funds. There is reason to believe a name change could help UMKC do better locally in this effort.

The Chancellor then presented slides and commentary on the evolving campus plan that is moving towards a more residential campus (but with more parking) and mixed use retail and apartment space including a Whole Foods store at 51st and Brookside. The new academic classroom addition to Miller Nichols Library and the Bloch School addition are expected to be finished by August 2013 while the new Student Success Center is opening in the old University Center this semester.

The Provost then took over the discussion sharing with the audience what the Success Center would be doing to increase retention, help first-time and transfer students chose majors and address those issues that otherwise might cause them to not succeed and leave UMKC. She also noted that a new general education curriculum across schools should soon be in place and plans for an Honors College and an Emeritus College were awaiting next steps.

The final presenter was UM Vice President Krawitz whose remarks addressed the need for UMKC and the UM system to be sure we did not find ourselves involved in conflict of interest issues, lack of transparency in our operations, and other operational and control matters that could put us in financial risk, operational risk or reputational risk. Against a power-point collage background of recent “scandals” and resignations in higher education involving entities that had not been adequately monitored, she reported that the Curators are taking a closer look at all 501(c)3 organizations associated with or supporting activities on all campuses. She noted that UMKC is a special case because of the manner in which it was created with many pre-existing entities in place. She also noted that many of the ways in which UMKC has effectively addressed this
issue are now being shared across the system. But it was a call for all to be cognizant of the risks and to partner in the efforts to eliminate the risks.

This was followed by a Q&A session. When asked why all of the UM campuses except UMKC had a nice building on campus named The Alumni Center, the Chancellor replied by saying that we had space limits at this point in time and that while he’d like to see something like this and a Faculty Club, we had to address other space needs first. He was then asked about the proportion of undergrads to others on campus and he noted the insert in the event program that had some of that data. But he indicated the current roughly 60-40 split needed to be changed to 75-25 to generate the tuition needed to support UMKC and mentioned the 20,000 in 2020 total enrollment target in his response. A final question asked him what we were doing about KU billboards that were appearing also claiming to be “Kansas City’s University.” He indicated that they were marketing their proximity just as we were marketing ours.

The event came to a close with a thank you speech from a student in the Conservatory who had received Trustee Scholarship support to attend UMKC. Her gracious and thoughtful remarks on behalf of all scholarship students were a fitting end to a fact-filled breakfast!

**UMKC Fast Fact:**

Of the more than 15,000 UMKC students today, 56% are undergraduates, 35% graduate students and 9% are dual credit high school and college students.

**NOMINEES FOR UMKCRA ELECTIONS APPROVED**

The Board, at its August 1, 2012 meeting, approved the slate of officers and board members to be voted on by the membership at the December 1st Luncheon and business meeting. The officer nominees are: Mary Anne Morgenegg for Vice President and President-Elect and Rita Messina for Secretary. For new three year terms on the Board, we have Reaner Shannon, Charles Volk and
Linda Edwards. John Ditto is slated for the remaining two years of the seat vacated by Rita Messina and Jennifer Martin is slated for the remaining year of Mary Anne Morgenegg’s seat on the Board. Nominee bios will appear in the November UMKCRA newsletter.

**EMERITUS COLLEGE PROPOSAL UPDATE**

The Proposal to create an Emeritus College at UMKC was submitted to the Provost earlier this year. The representatives from the working group are to meet in late August with Gail Hackett to get an update on the proposal’s status. Among those on the committee were a number of UMKCRA members including Nancy Mills, a past President who chaired the group. Others were Linda Edwards, Reaner Shannon, Merton Shatzkin, Dale Neuman, Leon Robertson, and ex officio, the then current Presidents of UMKCRA, initially Dick Hetherington and most recently Denny Schemmel. Among the proposal’s recommendations was that dedicated space be provided and equipped in the Library for members of the Emeritus College to use in retirement.

**NEW PARKING STRUCTURE NOW OPEN**

The Cherry Street Parking Structure at 51st Street between Oak and Cherry Street opened the week of August 6th. There are three entrances to the structure: from Oak, from 51st and from Cherry Streets. It has six levels with handicap and metered visitor parking available on the 5th level, near the structure’s two walkways. One walkway provides access to the Student Union, the other, to the Performing Arts Center. The metered parking area has pay devices located near the entrance to the walkways on the 5th level. Each level of the structure has elevator access so one can park on any level and get to the walkways. Your UMKC Retiree hangtag does work in the new parking structure, all the same rules apply.

**UMKC Fast Fact:**

Of the more than 106,000 alumni of record, more than 50% live in the Kansas City area.
UM RETIREE LEADERS TO MEET WITH UM LEADERS

Each year, retiree leaders from all four campuses meet with the UM President and the Vice President for Human Resources to discuss benefits and other issues of import to retirees. In the past, these took place twice a year. President Wolfe has asked that the number be increased to three to permit more frequent exchange of information. The meeting for Summer 2012 will take place in late August. At these sessions, retirees get briefings on the status of the retirement plan, pending issues regarding other benefits, and reports on changes that may be pending. In turn, retirees get the opportunity to alert system leaders of problems that have appeared in the handling of retirees’ issues as well as to urge changes seen to be needed. In addition, it is the time when retirees can document the amount of “value-added” service provided by retirees to their campuses and to the system through volunteer hours, contributions to capital campaigns by retirees, retiree United Way efforts and more. Look for the report of this meeting in the next newsletter (and, prior to its appearance, on the UMKCRA website). The cost of travel to these sessions is covered from the funds made available to UMKCRA by the Chancellor’s Office.

UM Fast Fact from Legislative Update Report:
Governor Nixon signed the FY 2013 state budget on June 22 with a 1% withhold, or approximately $9 million, for higher education. The University of Missouri System is slated to receive $394 million for the fiscal year that began on July 1.

Reports to the UMKCRA Board at the August 1, 2012 Meeting

(Editor’s Note: These reports have been edited or abridged to save space. Full reports are available on the website. Minutes can be found at: http://umkcra.umkc.edu click on About Us then Committees).
BENEFITS COMMITTEE  
By Ron MacQuarrie, Chair  

Inflation and Retirement Planning

University of Missouri employees who are planning to retire and who are eligible for a pension have the choice of a fixed monthly payment or a lower starting payment with an option of 2% or 4% annual increases. Apparently few UM employees select the optional annual increases. This choice is consistent with the results of national surveys of the decisions made by employees of other organizations. The consequence of this decision is that the value of the pension is not increased over time to adjust for the effects of inflation or other increases in the costs of living. On the other hand, social security payments are indexed for inflation, although the adjustments may underestimate the real effects of inflation. This may be pertinent for retirees because the benefit adjustments do not consider an inflationary component for medical or other costs that heavily impact many retirees.

No adjustments in Social Security payments were made in 2010 and 2011. Furthermore, recent proposals in Congress would decrease the amount of the inflationary increases for social security payouts, presumably as a way to contain increasing costs.

According to a report from the Society of Actuaries (SOA), only fifty five percent of retirees calculate the effects of inflation on their retirement planning, although the effects of inflation can be significant. To illustrate the effect of inflation on fixed incomes, the figure below shows the decline in purchase power of $100 as a result of inflation (using the consumer price index to adjust the benefit values). Starting in 1970, a fixed annual benefit payment of $100 lost more than half its purchasing value within ten years and lost 70% in twenty years. Fortunately, the rate of inflation has decreased since 1970; although a $100 dollar fixed pension in 1990 still would have lost 25% of its purchasing value in ten years. For those living on a fixed income (including social security), it may be prudent to save a portion of the income for future expenses or take

other actions to compensate for inflationary increases in prices. See your financial planner. You may also find useful information on this topic at websites such as AARP.org, Fidelity.com, and Vanguard.com.

Footnotes:
1. Society of Actuaries (www.soa.org)
2. www.jpmorganinstitutional.com
4. www.jpmorganinstitutional.com

Fast Fact about UMKCRA:
As of August 1, 2012, UMKCRA had 370 dues-paying members---the largest count since we were founded in 1989.

COMMUNICATIONS COMMITTEE
By Dale Neuman, Chair

The Committee met at 1:30 p.m. on July 23, 2012, in the Hyde Park Room of the Administrative Center. The first action was the unanimous motion to ask the Board to recognize and commend Dick Hetherington for his many years of hard work and leadership in chairing the committee and making it possible for us to move to the new website. His efforts have made it possible for the
committee to move on to other matters. *(Editor’s Note: The Board unanimously approved a motion to so recognize Dick for his extensive efforts over a number of years to upgrade the way UMKCRA communicates with its members.)*

In addition, it was agreed that we would not continue to work on a procedures guide for the committee per se at this time as the committee’s functions and hence its procedures appear to be evolving now that the website is in place. We will need to see how the proposed changes work out and then revisit the procedures question. One communications procedural issue that has surfaced has been the delay that seems to be occurring in updating the website---a problem that remains from the time before the new site existed.

We also agreed that we would not recommend any specific changes to the Bylaws until the Board had time to sort through the several proposals that may be coming forward from other committees. And, while there were some carry over proposals from this committee’s last report (including suggested revisions to the MOU between UMKC and UMKCRA), we felt those could also be held over until all other related matters were before the Board.

We agreed that we endorsed the concept of content ownership by officers and committee chairs as articulated by Dick Hetherington in some prior communications to the Board. They still have the responsibility for getting their official UMKCRA business communications to those who manage the website and edit the newsletter.

The Committee spent the rest of the meeting examining the concept of re-constituting itself into more of an editorial board that would monitor the UMKCRA communications processes for the Board but spend more time doing the work of communicating with, for and about UMKCRA. The editorial board idea would mean that members of the “Editorial Board” would propose ideas for stories (other than the business of UMKCRA) and undertake to write them
or assign them to be written by volunteer reporters who will “cover a beat” for the editorial board.

MEMBERSHIP COMMITTEE
By David Tanquary, Chair

Total membership count now is 370, the largest count since the Association was founded in 1989.

The committee believes that inactive, former employees of UMKC who are over the age of 55 and eligible for retirement should be eligible for UMKCRA membership, just as such active employees are. Consequently, the committee recommends to the Board that UMKCRA Constitution, Article III, Membership, Section 3, Pre-retirement Member, be changed from:

“Any active employee of the University of Missouri-Kansas City over the age of 55 and eligible for retirement from UMKC may become a Pre-retirement member of the Association by paying annual dues.”

to:

“Any active employee or inactive, former employee of the University of Missouri-Kansas City over the age of 55 and eligible for retirement from UMKC may become a Pre-retirement member of the Association by paying annual dues.”
(Editor’s Note: This and other items related to changes in our rules that are approved by the Board will be presented to the general membership at the December luncheon and business meeting.)

The committee considered the fact that there is no provision in the Constitution for the spouse of a living retiree to become a member of the Association, and concluded that such a provision would be of no value because it would require such a member to pay membership dues or a membership fee, but would provide no benefit to such a member other than those benefits already available to the spouse as the spouse of a living UMKC retiree.
PROGRAM COMMITTEE
By Mary Anne Morgenegg - Chair

On July 27, 2012 a group of ten UMKC retirees attended an interesting and informative demonstration at the Simulation Laboratory at the School of Nursing. Dr. Christine M. Zimmerman and Ms. Teresa Crowder presented an overview of how electronic “patients” are utilized to train nursing students and other health professionals.

The Spring Luncheon was held May 19, 2012, at the Student Union. Over 80 attended the luncheon. UMKCRA President Denny Schemmel, welcomed members. Denny reported that the Board had approved the naming of Pat Hovis-French to assume the position of Vice President and President Elect for 2012 to fill the vacancy created by the resignation of Bill Morgan.

The luncheon program included recognition of two UMKC faculty, one retired, and one still active as the dean of an academic unit. Dan Jaffe, Professor Emeritus of English, was awarded the first ever UMKCRA Recognition Award. His wife, Jo Ann, was also in attendance. A plaque with Dan’s name will soon be installed at the Administrative Center. The names of future UMKCRA awardees will be added in years to come.

Dean Peter Witte, Dean of the Conservatory of Music and Dance since 2008, then addressed luncheon participants. His tenure has been marked by extensive community involvement in the arts. He is currently encouraging discussions regarding moving the Conservatory to Downtown. Witte said relocating to a new downtown facility would allow the conservatory to accommodate its expanding enrollment and further its goal of becoming a premier institution for the arts.
VOLUNTEERING COMMITTEE
By Glenn Harrington - Chair

The Committee met July 17, 2012.

The Committee discussed the immediate need for volunteers to help at Student Orientation and to help students moving into apartments and residence halls.

To aid in future volunteer efforts of this type, we propose that it would be helpful if there were a sign-up sheet for Student Orientation volunteers at the Spring Reception/luncheon and a sign-up sheet for Commencement volunteers at the holiday reception/luncheon in December.

TREASURER’S REPORT
July 31, 2012

During the first half of 2012, the UMKC Retirees Association continued in strong financial condition with income and expenses paralleling the experience of 2011. On June 30, 2012 the Association held total assets of $14,485.79, including $7,522.48 in the quasi-endowment account and $6,963.31 in the operating account. This amounts to an increase in total funds of $2,782.46 since January 1, 2012. During the first half of 2012 income amounted to $8,417.42 and expenses amounted to $5,560.36.

RETIREES QUASI-ENDOWMENT ACCOUNT

Funds invested in the Retirees Quasi-Endowment Account are subject to increases and decreases in the value of investments held by the fund. It should be noted that the June 30, 2012 balance of $7,522.48 was lower than the balance as of January 1, 2012, by $74.60. This resulted primarily from a loss of value of investments in May 2012. For the year ending June 30, 2012, the Investment Account increased in value by 1.83 percent. Since the funds were
invested only in the first quarter of 2012, this amounts to a respectable return.

INCOME

In the first half of 2012 income from life memberships amounted to $2,400.00, and annual membership income amounted to $1,300.00.

Comparing actual 2012 income with budgeted amounts, receipts are $3,588.94 above the budgeted amount. The Chancellor’s support of $3,400 was received in the first quarter of 2012 causing most of this surplus. Without that factor, actual income was $188.94 above budget. Both Life and annual Membership income was well above budgeted amounts. This should be expected as the budgeted amounts are averaged over twelve months and actual income in these categories clumps in certain months.

EXPENSES

On the expense side of the ledger, budgeted expenses amounted to $4,775.14 and actual expenses totaled $4,652.59. Actual expenses were $122.55 less than the budgeted amount. Actual income exceeded Actual expenses by $3,711.49.

A Transaction report detailing all income and expense transactions on the operating account is available on request by contacting the Treasurer.

Accompanying this report are the following spreadsheets which explain these figures more fully.

   1. Actual vs. Budget, 1st Half 2012 Compared to Budget
   2. Income and Expense by Category, January thru June 2012

This report does not include balances in scholarship funds sponsored by the UMKCRA and administered by UMKC.
UMKC Retirees Association
Actual vs. Budget, 1st Half 2012 Compared to Budget

<table>
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<tr>
<th>Category Description</th>
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<th>Actual</th>
<th>Budget</th>
<th>Difference</th>
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<td><strong>INCOME</strong></td>
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<tr>
<td>Chancellor</td>
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<td>Events-Receipts &amp;</td>
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<td>Investment Income</td>
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<tr>
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<td>750.00</td>
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<td><strong>EXPENSES</strong></td>
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<td>-</td>
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<td>$(0.08)</td>
<td>$3,711.49</td>
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Prepared by Ted Sheldon
July 31, 2012
### Income/Expense by Category – Jan. thru June 2012

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<thead>
<tr>
<th>Category Description</th>
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<th>Apr 1-Jun 30, 2012</th>
<th>OVERALL TOTAL</th>
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<td></td>
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<td>Chancellor</td>
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<tr>
<td>Member Dues</td>
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<td></td>
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<td>Paid-Life</td>
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<td>Return of Funds</td>
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<td>$4,130.46</td>
<td>$(1,273.40)</td>
<td>$2,857.06</td>
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</tbody>
</table>

Prepared by Ted Sheldon
July 31 2012
Fast Fact about UMKCRA:
Between January 1 and June 30, 2012, UMKCRA officers and Board members spent 840 volunteer hours on UMKC-related activities. Translated into an eight-hour work day, that becomes 105 full days (or more than five months of work days in six calendar months) for UMKC. (Editor’s note: If other UMKC Retirees do volunteer work for UMKC, those hours need to be tracked as well. So, if you are doing volunteer work associated with UMKC, send us your hours to add into the total for this year.)

The UMKCRA Newsletter is edited by Dale Neuman. Please contact Dale at 816-942-9091 or neumand@umkc.edu with questions or comments about the newsletter. Rita Messina has joined the newsletter team as an assistant to the editor. Kim Rudolph of the Alumni and Constituent Relations Office manages design, layout and production.

RECOGNITION COMMITTEE SOLICITS NOMINATIONS

After reporting to the Board on the activities of the committee, Marvin Querry noted that nominations are open until December 1, 2012 and urged that members bring names with supporting documentation forward for either the staff award or the faculty award. For more details, see the materials reprinted here from a previous newsletter.

UMKCRA Retired Faculty Award Nomination Information

Award
This award is given to a University faculty retiree to recognize outstanding contributions and achievements to the university,
UMKCRA, their profession and/or the community during their retirement period.

**Eligibility**
Faculty who were *Qualified Members of the UM Retirement, Disability & Death Benefit Plan and have officially retired are eligible for this award. Posthumous awards may be made provided that all criteria have been met. Current UMKCRA Officers and Recognition Committee members are not eligible for nomination.

**Award Criteria**
Contributions of a retiree in the areas of teaching, research/scholarly works, service, or professional activities as well as service to UMKCRA will be considered by the UMKCRA Recognition Committee.

**Nominations**
Faculty (active and retired), administrators, staff and community members may make nominations. Persons nominating a retired faculty member for an award must complete the nomination form and provide a summary of the candidate’s contributions. Letters of support from individuals knowledgeable about the candidate’s contributions are encouraged.

**UMKCRA Retired Staff Award Nomination Information**

**Award**
This award is given to a UMKC staff retiree to recognize his/her outstanding accomplishments during retirement. Service to the University, UMKCRA, his/her profession and/or the community post-retirement is considered for the award.

**Eligibility**
Staff who were *Qualified Members of the UM Retirement, Disability & Death Benefit Plan and have officially retired from UMKC are eligible for this award. Posthumous awards may be made provided that all of the criteria have been met. Current
UMKCRA officers and Recognition Committee members are not eligible for the nomination.

**Award Criteria**
Accomplishments considered include service to the University, UMKCRA, the community, a profession and other achievements the nominator believes are noteworthy. Service to enhance the overall quality of the university experience for students, staff, faculty and retirees is considered.

**Nominations**
Faculty (active and retired), administrators, staff and community members may make nominations. Persons nominating a retired staff member for an award must complete the nomination form and provide a summary of the candidate’s contributions. Letters of support from individuals knowledgeable about the candidate’s achievements are encouraged.

*Full-time means an appointment with a duration of at least 9 months and a full-time equivalency of at least 75%.

*Qualified Member of UM Retirement Plan means the individual has earned the right to receive benefits from the Plan. She/he must complete five years regular service credit in order to be vested.

**UMKCRA RECOGNITION AWARD NOMINATION FORM**

**Submission deadline is December 1st of each year**

**INSTRUCTIONS:** Please complete the nomination form on the next page as fully as possible and provide the supporting documentation called for that you believe qualifies the person for the UMKCRA Recognition Award. Please refer to the Recognition Award Guidelines as you prepare your nomination. Provide as much information as possible about the nominee’s achievements in retirement and their impact that led you to nominate them for the award (including letters of recommendation from others who may know the nominee’s contributions as well).
UMKCRA RECOGNITION AWARD NOMINATION FORM

Part 1.
Name of Nominee: ________________________________
Year of Nominee's Retirement: _________________________
Department or School from which they retired: ______________
Faculty ____ or Staff ____ (Check one)
Home Street Address of Nominee: ________________________
City, State and ZIP: ____________________________________
Nominee’s Phone: _________________________________
Nominee’s Email: ______________________________________

Part 2.
Attach a brief description summarizing the reasons (in terms of the UMKCRA Recognition Award Criteria) you believe the nominee merits consideration.
Attach supporting evidence (newspaper, newsletter, magazine items or other appropriate data) documenting the nominee's achievements as a volunteer in retirement.

Part 3. To allow the Committee to follow-up in case there are questions, please provide:
Your Name: ____________________________________________
Your Phone: ____________________________________________
Your Email: ____________________________________________

Send completed form and supporting materials to:
UMKCRA Recognition Committee
300-B Administrative Center
5100 Rockhill Road
Kansas City, MO 64110