

Keeping MURA Strong: Planning for the Future

DEAR MURA MEMBERS,

It is my honor to follow in the footsteps of recent presidents like **Ina Linville, Ruth Tofle, Betsy Garrett** and **Jo Turner**, and all the MURA presidents before me. I will be true to the mission of serving our members and striving to achieve our objectives:

- Advocate
- Communicate
- Educate and socialize
- Contribute to the University family



Kenneth Dean

We must also plan for the future. Over the past year we have started to emerge from the Covid pandemic by holding more in-person meetings and educational programs. However, we continue to also offer our educational programs via Zoom for those unable to attend in person. That may be important as we seem to be on the verge of another increase in Covid cases and other diseases that disproportionately affect those in our age group.

Another factor that will affect MURA is the changing nature of retirement, and particularly the relatively recent changes to the pension plan. I wrote the paragraph below for my first email Update:

“Effective October 1, 2019, every newly hired employee of the University of Missouri (the System, all campuses, and MU Healthcare) will no longer be eligible to participate in the pension plan that all of us had available to us. Nor will they be eligible for our post-retirement healthcare. Every new employee becomes a member of a defined contribution plan, whereas we were members of a defined benefit plan. You might ask—why should I care? That is a fair and reasonable question. And as a practical matter it will have no effect on our pensions or health benefits. Not next year, or perhaps not for several years will we see any effect on MURA. But at some point, it may begin to affect membership and we must plan for it. One of my goals for this next year is to discuss and start thinking about how this change will affect us. We all have ties to the University through our pensions and health benefits. We have an incentive to ensure that our university and its finances remain strong. Employees who started after 2019 and ‘retire’ in the future will not have those same types of connections or incentives as do we. They may not even think of themselves as ‘retirees’ from MU. We are looking for ideas about how we—as an organization—deal with those future ‘retirees,’ and how we become relevant to them. If you have thoughts or ideas, please feel free to send them to me.”

When our MURA officers met with President Choi and his team from HR in August and alerted them to this issue and how it could affect not just MURA but also the University and its future relationship with “retirees,” particularly in fundraising (Advancement), they agreed that was a change that should be planned for and thought through. While this is a long-range issue, we do need to start planning now. As part of that planning, I will be forming a committee to again survey our members as we did almost three years ago. In addition, we will seek advice from other retiree organizations outside Missouri who are composed primarily of those who are on defined contribution plans.

I look forward to hearing from you on how we can better serve YOU.

Best wishes,
Kenneth Dean
MURA President
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MURA Focus

Member pastimes and hobbies

Visual and performing arts

Sports and fitness

Outdoor activities

Interesting collections

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You're Invited: Retiree Town Hall

Get Ready for Annual Enrollment for 2024 Insurance

Join us for a virtual benefits town hall on **Thursday, October 5 from 1-2 p.m.** Representatives from the University's insurance vendors will provide information and answer questions about medical insurance (both Medicare-eligible and non-Medicare eligible), as well as dental and vision benefits.

Please submit questions by Sept. 29 using this [online form](#).

You can join the Town Hall on Oct. 5 at umsystem.zoom.us/j/99279170662

MURA Financial Report

Donna Johanning, MURA Treasurer

The MU Retiree Association ended fiscal year 2023 with a cash balance on hand of \$5,263.63 and investments with Vanguard in the amount of \$105,557.22.

Annual and lifetime dues received and investment income transferred from the Vanguard account exceeded the amount budgeted as revenue for this past year. Total disbursements exceeded the budget by \$84.21. This includes a large one-time expense for postcards mailed to all retirees that included instructions for updating contact information in myHR.

Sponsorships received from Central Bank and Tiger Place were used to offset costs for our spring business meeting, monthly breakfasts, and the holiday luncheon. We thank these sponsors for their generosity and continued support of the organization and will use the funds to keep our social gatherings affordable for our members.

The statement on page 3 shows the actual receipts and disbursements for the year compared to the fiscal year 2023 budget as well as the budget for fiscal year 2024 that was approved at the July Board meeting.

United Way Campaign, A Favorite of Retirees, Kicks Off September 28

Dee Montgomery, MURA's United Way Representative



THIS YEAR'S UNITED WAY KICKOFF will take place on Sept. 28 with a goal of \$460,000. Since 1946, the Heart of Missouri United Way (HMUW) has fought for mid-Missourians, investing nearly \$98 million to improve their health, education, and financial stability. Last year, the University of Missouri contributed **\$437,090** to the HMUW with retirees comprising a **very generous 31%** of that total. On September 28, a letter and pledge card for the 2023-2024 campaign will be sent to all MU retirees.

The Heart of Missouri United Way works to remove barriers to health, education, and financial stability by forging strategic partnerships, fostering effective solutions, harnessing the best resources, and inspiring others to join them in their efforts. Each year, the United Way analyzes service data. Examples of results from their recent data collection show 100% of all income-eligible families received tuition reduction for early childhood education services and **91% of funded programs met or exceeded their expected benchmarks in reading and math.** Statistics for addressing the health needs of seniors showed that **100% of those served reported that United Way-funded services positively impacted their ability to live independently.** You can read more about the agencies and funded programs at uwheartmo.org/our-impact.

MURA members may be interested in Heart of Missouri United Way's "Give 5" civic matching program for retirees. Every Friday for five weeks, different local non-profits will be featured. Participants have fun, make new friends, and learn about volunteer opportunities that match their talents, passions, and personalities. If you are interested, the next Give 5 Cohort will begin on October 5. The link to sign up online is <https://www.uwheartmo.org/volunteer/give-5/>.

Heart of Missouri United Way



MURA Budget to Actual Analysis FY 2023 and Budget for FY 2024

	Budget FY 2024	Budget FY 2023	Actual thru 6/30/23	% FY 23 Budget
Operating Activities Supported by Member Dues and Investment Income				
Receipts				
Due - Annual	500.00	300.00	550.00	183.33%
Dues - Lifetime	3,200.00	3,200.00	3,450.00	107.81%
Donation to MURA	0.00	0.00	170.00	0.00%
Sponsorships	1,000.00	1,500.00	1,000.00	66.67%
Investment income - Vanguard	3,500.00	2,700.00	3,380.76	125.21%
Total Operating Receipts	8,200.00	7,700.00	8,550.76	111.05%
Disbursements				
Business meeting	1,000.00	1,000.00	701.50	70.15%
Orientation meeting, Board meeting deposit	500.00	0.00	540.39	0.00%
AROHE Dues	120.00	120.00	120.00	100.00%
Flagship Council	250.00	250.00	250.00	100.00%
AROHE Conference	0.00	1,200.00	0.00	0.00%
Copies, printing services	1,000.00	500.00	1,928.45	385.69%
Video and recording expense	1,000.00	0.00	0.00	0.00%
Post office box rent and postage	150.00	150.00	146.00	97.33%
Software (WinHost, Jotform, Adobe)	750.00	500.00	647.28	129.46%
State of Missouri Secretary of State filing fee	0.00	0.00	10.50	0.00%
Payment to University for Kitty Dickerson Schp	0.00	0.00	170.00	0.00%
PayPal fees assessed against dues payments	100.00	100.00	70.09	70.09%
Miscellaneous	130.00	680.00	0.00	0.00%
Total Operating Disbursements	5,000.00	4,500.00	4,584.21	101.87%
Excess of Operating Receipts over Disbursements	3,200.00	3,200.00	3,966.55	123.95%
Self-Supporting Social Activities				
Holiday Luncheon				
Receipts - Members	2,500.00	2,500.00	2,175.00	
Receipts - Sponsorship	1,500.00	1,000.00	1,114.95	
Disbursements - PayPal	100.00	100.00	66.45	
Disbursements - Holiday Inn Exec Ctr, pianist	3,900.00	3,400.00	3,223.50	
Net Receipts (Disbursements)	0.00	0.00	0.00	0.00%
Shakespeare's Fundraiser				
Receipts	0.00	0.00	379.82	
Disbursements-MU for Kitty Dickerson Schp	0.00	0.00	379.82	
Net Receipts (Disbursements)	0.00	0.00	0.00	0.00%
Spring Event				
Receipts	1,000.00	1,000.00	840.00	
Disbursements - PayPal			44.73	
Disbursements-University for Kitty Dickerson Schp	1,000.00	1,000.00	795.27	
Net Receipts (Disbursements)	0.00	0.00	0.00	0.00%
Fall Social				
Receipts	1,000.00	1,000.00	0.00	
Disbursements - PayPal			0.00	
Disbursements-MU for Kitty Dickerson Schp	1,000.00	1,000.00	0.00	
Net Receipts (Disbursements)	0.00	0.00	0.00	0.00%
Breakfasts				
Receipts - Members	10,000.00	10,000.00	9,015.00	
Receipts - Sponsorships	2,500.00	2,000.00	1,885.05	
Disbursements - PayPal	400.00	400.00	393.64	
Disbursements - Venues	12,100.00	11,600.00	11,307.90	
Net Receipts (Disbursements)	0.00	0.00	(801.49)	0.00%
Other Receipts (Disbursements)				
Transfer to/from investment account	(3,200.00)	(3,200.00)	(3,450.00)	107.81%
Net Increase (Decrease) in Cash During Period	0.00	0.00	(284.94)	
Cash Balance, Beginning of Period	5,500.00	6,000.00	5,548.57	
Cash Balance, End of Period	\$5,500.00	\$6,000.00	\$5,263.63	

MURA Members Getting Outside!

MURA Focus

On members' pastimes and hobbies

Visual and performing arts

Sports and fitness

Outdoor activities

Interesting collections

2023 Faculty Retiree of the Year **David Leuthold** enjoying hiking the Oregon coast.



MURA President **Kenneth Dean** at the Kenya/Tanzania border on safari observing the Great Migration.



MURA past secretary and current newsletter editor **Mary Licklider** and her husband Gary enjoying a day this summer as guests of retiree **Diane Oerly** at her cabin north of town. Quite an impressive stringer of fish!



That smile demonstrates the joy that MURA member **Jeff Belden** experiences from cycling.

Start Thinking Now About Nominees for Chancellor's Awards for 2024

Dick Otto, Awards Committee Co-chair

Now is the time for everyone to be working on finding folks that are worthy of being awarded the Chancellor's Award for Volunteer Retiree of the Year. Please drop me an email at OttoR@missouri.edu with the names of individuals and the committee will take it from there. A few basic points, to be eligible for the award the nominee must have retired from the University prior to January 1, 2018. The award is to recognize their volunteer service to their community, university or professional or civic organization since their retirement. There are two awards, one for a retired faculty member and one for a retired staff member. A list of past awardees may be found at <https://mura-missouri.com/chancellors-retiree-of-the-year-awards/>. David Leuthold and Libby Miederhoff were award winners for 2023.

Enjoy Shakespeare's AND Support MURA's Scholarships!

Ted Tarkow, Scholarship Committee Chair

All fans of Shakespeare's can satisfy their craving for Shakespeare's AND help MURA raise funds for the Kitty Dickerson Scholarship by going to any of the three Shakespeare's on **Wednesday, November 15**. Shakespeare's will contribute 15% of all proceeds to the Dickerson Fund on that day. Gift certificates for the holidays are always appreciated, and add to our cause! A flyer (which can be downloaded onto one's phone) will be available in a few weeks, and will be made available to MURA members.

Don't miss the informative bi-weekly MURA Update Emails!

Please provide any email address updates to **Barb Harris**, MURA Communication chair, at harrisb@umsystem.edu.

Find MURA on Facebook!



Search for MURA.

Select "MU Retirees Association-MURA."

Give us a thumbs up!

Mark Your Calendars!

The Education & Program Committees Have a Full Fall Schedule for MURA Members

Jim Scott, Program Committee Chair

Thanks to the Program and Education Committees, we have excellent sessions planned through the end of the year. Our October 3 breakfast, to be led by **John Bailey** and **Chris Watkins** of Central Bank and Trust, will discuss common mistakes in estate planning. On October 5, we are invited to participate in a UM Town Hall session on medical benefits offered to UM retirees. On October 16, President **Mun Choi** has invited us to a social at the Chancellor's Residence on the Quad.

At our November breakfast, **Jim Gann** will provide an update on the unique MU Research Reactor. On November 30, we'll host our annual holiday social at the Holiday Inn Executive Center.

Our breakfast in December will be held on December 12 because the Country Club of Missouri's facilities will be tied up on our normal day of the month. The speaker will be MU Athletic Director **Desiree Reed-Francois**.

These events are all listed on the handy Upcoming Events calendar on page 8.



MURA Leadership Directory 2023-24

BOARD OFFICERS AND MEMBERS

Dean, Kenneth	President	deank@missouri.edu
Scott, Jim	President-elect	scottj@missouri.edu
Linville, Ina	Past President	linvillei@missouri.edu
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Johanning, Donna	Treasurer	JohanningD@umsystem.edu
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Donna Otto	Member-at-large-Faculty	ottod@missouri.edu
Bouchard, Chris	Member-at-large-Faculty	bouchardc@missouri.edu
Diamond, Randy	Member-at-large-Faculty	diamondrj@missouri.edu

STANDING COMMITTEE CHAIRS

Otto, Dick	Awards Co-chair	Otto, Dick
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Lorenz, Linda	Education Co-chair	lorenzl@missouri.edu
Helm, Sheri	Education Co-chair	helms@missouri.edu
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Tarkow, Ted	Kitty Dickerson Scholarship	tarkowt@missouri.edu

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MURA Committee Directory 2023-24

STANDING COMMITTEES

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Helm, Sherri	Co-chair	helms@missouri.edu

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Membership Committee

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Quinn, James	Member	Quinnj@missouri.edu

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Past Presidents Committee

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Dean, Kenneth	Ex officio	deank@missouri.edu

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Schneider, Barbara	Osher Lifelong Learning Institute	Schneider@missouri.edu
Metzgar, Karma	MU Engagement Council	metzgark@missouri.edu
Otto, Donna	Honorary Degrees	ottod@missouri.edu
Henderson, Tom	Boone County Alumni Assoc. Legislative Committee	henderson@missouri.edu

UPCOMING EVENTS

Month	Speaker/Program	Location	Time
October 3	“Common Mistakes in Estate Planning” John Bailey & Chris Watkins	Country Club of Missouri	8:00 – 9:30 am
October 5	UM Town Hall Webinar on Medical Benefits	Via Zoom	1:00 pm
October 16	Social with President Choi	Residence on the Quad	4:30-6 pm
November 7	“What’s Happening at MURR?” Jim Gann, Associate Director for Business Development	Country Club of Missouri	8:00 – 9:30 am
November 30	Holiday Social	Holiday Inn Exec Center	10:00 am - 1:00 p.m.
December 12	“MU Athletics – An Update” Desiree Reed-Francois, MU Athletic Director	Country Club of Missouri	8:00 – 9:30 am

October Breakfast: Common Mistakes in Estate Planning

Jim Scott, MURA President-elect & Program Committee Chair

Estate planning is an important process that ensures a person’s wishes are carried out after death and during incapacitation. A thorough estate plan often consists of several documents designed to accomplish a variety of goals. While an estate plan may be unique to the individual, there are common mistakes that sometimes occur. During this presentation, we will share some common estate planning pitfalls and discuss steps you can take to create an estate plan that will provide peace of mind for you and your family.

The breakfast program (October 3, 8:00–9:30 a.m., Country Club of Missouri) will be presented by **Chris Watkins** and **John Bailey**. Chris has worked in private practice as an attorney for over 20 years, representing and advising individuals and businesses in matters involving estate planning, corporate law, contracts, and business transactions. Chris’s primary role at Central Trust Company is to provide guidance and expertise to clients in matters concerning estate planning, trust administration, wealth management, and business succession planning.

John began his financial services career in Columbia, Missouri, in 1996. His primary role with Central Trust is to develop relationships with potential clients and match client investment and estate planning needs with the expert services of Central Trust..

Register at this link by noon on September 25:

<https://mura-missouri.com/event/mura-breakfast-meeting-october-3-2023/>



John Bailey, CFP, Senior Vice President and Wealth Management Advisor, Central Trust Company



Chris Watkins, JD, Vice President and Relationship Manager, Central Trust Company



YOU'RE INVITED!

PRESIDENT MUN Y. CHOI
invites you to join him for the

MURA FALL SOCIAL

MONDAY, OCTOBER 16, 2023
4:30-6 p.m.

THE RESIDENCE ON FRANCIS QUADRANGLE
University of Missouri
[501 South Ninth Street](#)

Parking available in [Turner Avenue Parking Structure](#).



CLICK HERE TO RSVP BY OCT. 6

Questions? Contact University Events: events@missouri.edu.



MU Retirees Association

University of Missouri
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