HISTORY OF UT RETIREES ASSOCIATION

By Michael Betz and Gary Schneider, both Professor Emeritus
Both former presidents of UTRA

INTRO: This brief history was compiled to explain who we are, how and when we arose, why our name changed recently and why we moved to Alumni Affairs for administrative support. Because of changes taking place as of October 2015, a context is needed in which to understand these changes within the wider walls of history and UT. From the historical time lines to the "why-lines", we humble scribes stitched together this history from interviewing living leaders, some remaining records after many were destroyed, and old newsletters of the retirees association.

The UT retirees association arose from the confluence of two different streams of influence in the late 1970’s: efforts from the bottom up within UTK Faculty Senate’s Fringe Benefits committee and the UTK Office of Personnel, and outside efforts from newly arrived faculty sharing their experiences from elsewhere with then Chancellor Jack Reese.

INTERNAL EFFORTS

Efforts to enhance benefits and to create a retirees association arose from the Faculty Senate’s Fringe Benefits Committee in 1977 chaired by Dr. Frank Leuthold, Dept. of Agricultural Economics and Rural Sociology. The committee consulted with the Office of Personnel at UTK, with Therese Leadbetter as a key contact in these discussions. Leadbetter’s personal interest in the importance of having a pre-retirement planning program began in 1976. She joined the International Society for Pre-retirement Planners, enrolled in a trainer’s workshop entitled “Helping People Plan for the Rest of Their Lives” at Drake University, and took courses in Gerontology and Sociology of Aging taught by Dr. William Cole, Dept. of Sociology, who encouraged her to form a UT retiree association. In 1977, Leadbetter submitted a pre-retirement planning proposal that was approved, and such programs began at UTK.

In the fall of 1978, Leadbetter met with Dr. Cole and Dr. Henry Fribourg, Dept. of Plant and Soil Sciences, to discuss the feasibility/desirability of forming a UTK retirees’ association. At the same time, Leuthold’s Faculty Senate Committee on Fringe Benefits started discussions with Leadbetter on forming a UT retirees association for university employees. Leuthold became president of the Faculty Senate for 1978-79, and Fribourg became chair of the Fringe Benefits Committee. The committee invited Dr. Cole to provide information and research about retiree associations which then became the basis for the committee’s proposal to the Senate. In January 1979, the Fringe Benefits Committee submitted a proposal to the Faculty Senate for a UT retiree association. The proposal passed in February with subsequent full support and approval from Chancellor Reese.

OUTSIDE INFLUENCES

The outside influences occurred during this same time period. Dr. Gary Schneider came to UTK in 1977 as Head of the Department of Forestry, Wildlife and Fisheries. He asked Chancellor Reese why there was no retiree association at UTK. Reese asked Schneider to determine what
Chancellor Reese and his staff, a suite of rooms (Suite 112) was located in Tyson Alumni House. Barber was initially responsible for coordinating the staffing of our office and forming the UTRA Auxiliary Service corps which recruited volunteers to assist working with the silver collection in McClung Museum and conducting campus tours.

The UTRA office was relocated from Tyson House to the Conference Center Building in the mid-1990s. It was located in different offices in the Conference Center Building until October 2015 when we again moved back to Tyson House.

Following Leadbetter's retirement in June 2006, Dr. Connie Baskett served as advisor for one year. Michael Herbstritt in Human Resources became the advisor to UTRA from the fall of 2007 to spring 2010. In 2010, Human Resources reorganized and UTRA's advising and administrative support was transferred from Employee Relations to Benefits and Retirement, with Priscilla Bright who served as advisor for one year until Jon Gushen was hired in 2011. Gushen became the advisor until the end of the 2014-15 academic year when Chancellor Jimmy Cheeks, in response to his Task Force’s report as covered below, moved UTRA to a new administrative home in October 2015 to Alumni Affairs. Phyllis Moore in Alumni Affairs became our new advisor/support person.

**The UNIVERSITY BENEFITS FROM RETIREE RESOURCES and LEADERSHIP**

During its 37 years of existence, the UT Retirees Association established a firm partnership with UT, benefitting the institution: donations were made to the UT Library Fund, the Employee Assistance Program (EAP), granted student scholarships, advised students, and served on dissertation committees. The retiree association contributed over $3400 to the Employee Assistance Program within the Office of Personnel from 1984-1995. The EAP funds assisted UT employees who needed help in a financial crisis, e.g., rent, food, KUB bills, car repair, and living expenses. In April 1996, the Budget Committee established a yearly $1000 student scholarship fund for a UT student. During the 2000-01 year, Board Member Dr. Gary Schneider suggested that UTRA establish an endowment to self-fund this scholarship. In November the Board committed $6400 of UTRA funds from a Certificate of Deposit and other funds toward the endowment, which required $15,000. An appeal to retirees for tax-deductible donations to the scholarship fund was made via the June 7, 2001 Newsletter—needed $4000 to reach by December 31, 2001. After that time $25,000 was needed to establish an endowment to self-support the scholarship. By the winter of 2008, they successfully raised the funds to establish the endowed student scholarship. The scholarship continues to be awarded annually. Student scholarships were granted from 1996 to the summer of 2015, most commonly of $1,000. A self-sustaining scholarship fund started in Nov 2008 with $25,000 and after granting 32 scholarships, the market value as of November 2015 was $36,334. Those receiving the award were invited to the Holiday reception to be honored and to meet current members of the Association.

The UT retirees association and its leadership were instrumental in helping other universities in Tennessee form a retirees association. (East TN State University (ETSU) and UT Chattanooga) and a state organization of TN retiree associations at public institutions of higher education. In the early 1980's, Dr. Bill Fisher of East Tennessee State University (ETSU) contacted UT’s
Cheek in April 2015 proposing that UTRA be aligned with UT Knoxville Alumni Affairs with the following vision and focus areas.

**TASK FORCE’S VISION OF THE UTK RETIREES ASSOCIATION**

The Vision of the UTK Retirees’ Association is to enhance opportunities for former employees of The University of Tennessee, Knoxville and their spouses to continue their association with the University and their colleagues in ways that reflect the continuing value of retirees to the institution and their potential for assisting the institution in its progress toward being recognized as a top 25 public research university. (Currently “retired” faculty may continue to do supported research channeled through the University and some receive compensated or uncompensated teaching assignments. As support organizations such as Boards of Visitors are established for Departments and Programs at the University, retired faculty and staff may prove valuable as members or sources of information on potential contributors to the university either financially or in other ways.)

The new organization retains the endowed scholarship, dropped the requirement for payment of dues, and established four initial focus areas of:

- Improved communication and collaboration between retirees and the institution.
- Development of opportunities for volunteering.
- Expanded opportunities for event and social participation.
- Recognition of retiree contributions to The University and the community.

Chancellor Cheek approved this vision as proposed by the task force. Then the UT, Knoxville Alumni Affairs Board of Directors reviewed and approved it in October 2015. To join the association, retirees must express interest to Alumni Affairs by providing a current address and/or other contact information for the UT Retirees Council. Because there is no charge for membership which in the past supported student scholarships and other services, fund raising will most likely be needed to maintain/increase the existing endowment of $36,334 as of fall 2015. Our new office is located in Tyson House.

**APPENDIX ‘A’**

**Historical Time-line of UTRA Events**

Pre 1978- UTK Faculty Senate/Office of Personnel, and newly arriving faculty from outside academic institutions all call for the creation of a UT organization for retirees

1978 Fall- Leadbetter, Cole and Fribourg met to discuss the feasibility/desirability of forming a UTK Retirees’ Association

1979 Jan. -Faculty Senate’s Fringe Benefits Committee proposed the formation of UT retirees association

1979 Feb. -Faculty Senate passed the Fringe Benefits Committee proposal and Chancellor Jack Reese approved it
2015 Oct. - UTRA formally transitioned from Human Resources to Alumni Affairs, and renamed the UT Retirees Council, with an office in Tyson House

APPENDIX B

Benefits to UT Retirees with defined years of service:

- Health insurance
- Library privileges
- Emeritus parking tag
- Email-service
- UT Medical Center
- Use of Pharmacy in Student Health Centers
- University Stores discounts
- UTK Theater ticket discounts
- Fee waivers for UTK courses
- Aquatic center membership/Use of T-Recs
- TN State Parks & Recreational site discounts
- UT Federal Credit Union membership
- Use of College of Veterinary Medicine Small Animal Clinic
- UT Autumn Festival/Picnic
- Membership in Club LeConte as a “University Club Member.”
- Initiation fee and minimal monthly dues extended to former members of the University Club

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