



2023 Annual Conference Big 10 Retiree Association

July 26 to 28, 2023

Fluno Center
601 University Avenue
Madison, WI

Hosted by
University of Wisconsin – Madison
Retirement Association

WELCOME!

We are excited for the opportunity to welcome you to the University of Wisconsin-Madison for the 2023 Annual Big10 Retiree Association Conference!

While each of our associations are similar, we are different as evidenced on the BTRA comparison spreadsheet. The conference affords the host association the chance to showcase their institution and provides representatives from across the Big 10 a forum to share best practices and participate in free-form discussions and insightful conversations on a variety of topics of interest to our associations. As in years past, we have put together a collection of presentations and tours to whet your appetite for learning. It's an exciting time for our retirement associations as we continue to grow and adapt, remaining always adaptable, motivated and responsive to our current and future members.

Thank you for sharing your time with us. It is our hope you learn, share, and enjoy!

Wishing you a fruitful experience,

*UWRA Board of Directors and
BTRA Conference Planning Committee*

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THE WISCONSIN IDEA

This year’s theme is encompassed in “*The Wisconsin Idea*”. One of the longest and deepest traditions surrounding the University of Wisconsin, *The Wisconsin Idea* signifies a general principle: that education should influence people’s lives beyond the boundaries of the classroom.

Central to the core mission of the University of Wisconsin–Madison is our commitment to *The Wisconsin Idea*, which states that what we do here at the University should enhance the lives of every person in the State of Wisconsin, as well as around the nation and the world. The evidence of this commitment lies in our many ongoing initiatives: direct and tangible actions that are aimed at identifying and addressing many of the state’s and the world’s most urgent and complex problems.

Guided by the commitment to public service, we are active participants in the Madison area. Our contributions make Wisconsin financially stronger and more competitive across all industries. The UW is home to many of today’s top thinkers, researchers, and leaders, who are frequently sought out to help with the nation’s emerging challenges.



The University of Wisconsin-Madison occupies the ancestral home of the Ho-Chunk Nation and acknowledges the circumstances that led to their forced removal and honors the Ho-Chunk Nation’s history of resistance and resilience. UW-Madison respects the inherent sovereignty of the Ho-Chunk Nation, along with the eleven other First Nations of Wisconsin.

CONFERENCE AGENDA

Wednesday, July 26, 2023

11:00 am-1:00 pm	Registration Outside Fluno Center Room 219
1:00-1:30 pm	Welcome, Introductions, and Housekeeping Items Fluno Center Room 219
1:30-3:00 pm	Presentation Fluno Center Room 219 “Creating a Sustainability Community through Collaborative Partnerships at UW–Madison” Nathan Jandl, Associate Director, Office of Sustainability
3:15-4:00 pm	Roundtable Discussion Fluno Center Room 219 ♦ <i>What is the biggest challenge you face keeping retirees engaged?</i> ♦ <i>What are the most successful strategies and initiatives you have used?</i>
4:45 pm	Meet Fluno Center Lobby, board bus
5:00, 5:15 & 5:30 pm	Bus departure times to Pyle Center for reception, dinner, and keynote
5:15-6:15 pm	Reception Pyle Center, Alumni Lounge
6:30 pm	Dinner Pyle Center, Alumni Lounge
7:30 pm	Keynote Pyle Center, Alumni Lounge “Higher Education—Serving the Underserved” Jeff Russell, Vice Provost for Lifelong Learning, and Dean, Division of Continuing Studies
8:30 & 8:45 pm	Bus departure times for return to Fluno Center

Thursday, July 27, 2023

Breakfast on your own.....	Fluno Center Dining Room
9:00-9:45 am	Annual Business Meeting..... Fluno Center Room 219 (See Page 12-17 for agenda and meeting materials)
10:00-11:00 am	Presentation Fluno Center Room 219 <i>“Land Grant Universities and the Wisconsin Idea”</i> Adam R. Nelson, Senior Associate Dean, School of Education and Vilas Distinguished Achievement Professor, Educational Policy Studies and History
11:15-12:15 pm	Presentation Fluno Center Room 219 <i>“Lake Mendota and UW-Madison: The Wisconsin Idea at Work”</i> Steven R. Carpenter, Free-Range Scientist, Center for Limnology & Stephen Alfred Forbes Professor of Department of Integrative Biology
12:30 pm	Lunch..... Fluno Center Dining Room
1:30 pm	Chazen Tour Participants Meet Fluno Center Lobby
1:45-2:45 pm	Participant Tour Choice (See Page 10 for description and details) ♦ Guided tour Chazen Museum of Art..... Chazen Museum OR ♦ Campus Highlights Virtual Tour Fluno Center Rm 219
3:00-4:00 pm	Roundtable Discussion..... Fluno Center Rm 219
4:45 pm	Meet Fluno Center Lobby, board bus
5:00, 5:15 and 5:30 pm	Bus departure times to Dejope Residence Hall for reception, dinner, and keynote
5:15-6:15 pm	Reception.....Dejope Residence Hall, Mendota Room
6:30 pm	Dinner Dejope Residence Hall, Mendota Room
7:30 pm	Keynote.....Dejope Residence Hall, Mendota Room <i>“Honoring the Ho-Chunk Heritage”</i> JoAnn Jones, Retired Ho-Chunk Nation Trial Judge
8:30 & 8:45 pm	Bus departure times for return to Fluno Center

Friday, July 28, 2023

Breakfast on your own.....Fluno Center Dining Room

9:00 am Roundtable Discussions &
 Parking Lot Issues.....Fluno Center Room 219

12:00 pm Adjournment

Box Lunches.....Outside Fluno Center Room 219

SAFE TRAVELS HOME . . .

See you next year at

The Ohio State University in Columbus!



PRESENTER BIOGRAPHIES



Wednesday, July 26
1:30-3pm

“Creating a Sustainability Community through Collaborative Partnerships at UW–Madison”

Nathan Jandl, Associate Director
UW-Madison, Office of Sustainability
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Dr. Nathan Jandl works to cultivate, advance, and communicate sustainability initiatives at UW–Madison. He both collaborates with campus leadership on sustainability strategy and implementation and directs communications initiatives for the Office of Sustainability. He also plays an active role in UW System sustainability efforts with colleagues across the state. He received his Ph.D. from UW-Madison. His academic work addressed the environmental humanities and 20th-century American literature and art.



Wednesday, July 26
Evening Reception

Sonia Driskill, Harpist

Sonia has been playing harp for 17 years and is a 2022 UW-Madison graduate. While quite busy with their day job working for Exact Sciences, they make plenty of time for their passion in music. They play for a variety of events and have even played in Canada, Argentina, and France.

PRESENTER BIOGRAPHIES

Wednesday, July 26

Evening Banquet

“Higher Education — Serving the Underserved”

Jeffrey S. Russell, UW-Madison Vice Provost for Lifelong Learning, and Dean, Division of Continuing Studies
Jeffrey.russell@wisc.edu



In his roles, Jeffrey S. Russell provides leadership and administrative oversight for programs that engage the community in lifelong learning. This encompasses a diverse menu of noncredit offerings and credit outreach programs, as well as UW-Madison’s summer term. Continuing Studies advises and admits adults seeking to enroll as University Special or Guest Students and markets the Professional degrees and Certificates portfolio of degree and certificate programs tailored for working adults.

Jeff first joined UW-Madison’s faculty in 1989. He earned his B.S. degree in civil engineering from the University of Cincinnati, along with M.S. and Ph.D. degrees from Purdue University. He is a registered professional engineer in Wisconsin.

Thursday, July 27

10 – 11:00 am

“Land Grant Universities and the Wisconsin Idea”

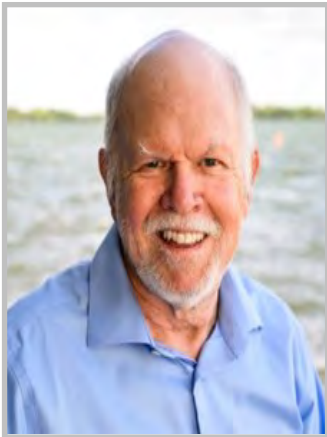
Adam R. Nelson, Senior Associate Dean, School of Education and Vilas Distinguished Achievement Professor, Educational Policy Studies and History at UW-Madison
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His research has been funded by grants from the National Endowment for the Humanities/American Antiquarian Society, the National Academy of Education/Spencer Postdoctoral Fellowship Program, the Charles Warren Center for Studies in American History at Harvard, the Advanced Studies Fellowship Program at Brown, and the Vilas Associate Program at the University of Wisconsin-Madison. This fall, he will publish two new books: *Exchange of Ideas: The Economy of Higher Education in Early America* and *Capital of Mind: The Idea of a Modern American University*.

He received his MA and Ph.D. in History from Brown University, and his BA in History from St. Olaf College.

PRESENTER BIOGRAPHIES



Thursday, July 27
11:15 am—12:15 pm

***“Lake Mendota and UW-Madison:
The Wisconsin Idea at Work”***

Steven Russell Carpenter, Free-Range Scientist,
Center for Limnology and Stephen Alfred Forbes
Professor of Department of Integrative Biology
steve.carpenter@wisc.edu

Stephen (Steve) Carpenter is one of the foremost experts on Lake Mendota, the lake that borders the University of Wisconsin. Through his work on the economics of eutrophication, he worked with factories and farms to develop cost effective strategies for minimizing phosphorus run-off. He is an experienced organizer of scientists, managers, and the general public to improve understanding and performance of natural resources in urban or working settings.

Carpenter is a member of the U.S. National Academy of Sciences, a Fellow of the American Academy of Arts and Sciences and has received recognition from around the world for his work. His Ph.D. is from U.W. Madison and prior to returning to Madison he spent 10 years at the University of Notre Dame.



Thursday, July 27
Evening Banquet

“Honoring Ho-Chunk Heritage”

Retired Ho-Chunk Nation Trial Judge JoAnn Jones was the first female president of the Ho-Chunk Nation. Judge Jones graduated from UW-Madison in 1982. She received an MS degree from UW-Madison in 1983, and her JD from UW Law School in 1986.

PARTICIPANT TOUR CHOICES

THURSDAY AFTERNOON (1:30-3:00 PM)

The Chazen Museum of Art

Meet Immediate Past UWRA President Jane Dymond in the Fluno Center Lobby at 1:30 pm. The Chazen Museum is a short walk. Tour will begin at 1:45 pm.

The Chazen Museum of Art makes its home between two lakes on the beautiful campus of the University of Wisconsin–Madison. Within walking distance of the state capitol, it sits squarely in the heart of a vibrant college town. The Chazen’s expansive two-building site holds the second-largest collection of art in Wisconsin and is the largest collecting museum in the Big 10. Within its 176,000 square feet of museum space is a collection of approximately 24,000 works of art covering diverse historical periods, cultures, and geographic locations, from ancient Greece, Western Europe and the Soviet Empire to Moghul India, 18th-century Japan and modern Africa.

The Chazen Museum of Art opened in 1970 as the Elvehjem Art Center to further the UW’s mission of education, research, and public service. In 1978 it became the Elvehjem Museum of Art. In 2005, in honor of a lead gift toward expansion, the Museum was renamed the Chazen Museum of Art after alumni Simona and Jerome A. Chazen, the latter being a founder of Liz Claiborne, Inc. The expansion opened in October 2011, doubling the size of the Museum. The new building is joined to the Conrad A. Elvehjem building by a dramatic and functional bridge gallery. The Elvehjem Building is dedicated to the memory of Conrad Elvehjem, an internationally known biochemist in nutrition and the 13th president of UW-Madison from 1958 to 1962.

***** OR *****

Virtual Campus Tour

*UW-Madison Campus and Visitor Relations
Fluno Center, Room 219*

The University of Wisconsin–Madison is known throughout the world for excellence in teaching, research, and service, but we are also known for our one-of-a-kind campus.

Built on an isthmus and surrounded by lakes, our university and the city of Madison offer you a mix of experiences that span the arts, history, academia, nature, sports, and some of the best dining in the world. Whether it’s being named the greatest college football town in the nation by *Sports Illustrated*, being ranked third in the nation for best cities to live by *livability.com*, or having the best food trucks in America, according to *MSN*, our campus and community seamlessly combine to create an atmosphere unlike any other campus you’ll find.



Big 10 Annual Business Meeting
University of Wisconsin-Madison
Fluno Center, Room 219
Thursday, July 27, 2023

AGENDA

Call to Order,.....Mary Czyszak-Lyne,
Conference Chair

Appointment of secretary pro-tem

Official Welcome to Maryland

Roll Call of Associations

Illinois	Michigan	Northwestern	Purdue
Indiana	Michigan State	Ohio State	Rutgers
Iowa	Minnesota	Pennsylvania	Wisconsin
Maryland	Nebraska	State	

Minutes - 2022 Conference at Northwestern University (See page 14)

Old Business

New Business

- Schedule Review of Hosting Associations

Insert of Maryland into rotation schedule

2023 University of Wisconsin	2029 Purdue University
2024 The Ohio State University	2030 Pennsylvania State University
2025 University of Michigan	2031 University of Illinois
2026 University of Minnesota	2032 University of Iowa
2027 Michigan State University	2033 Indiana University
2028 University of Nebraska	2034 Northwestern University

2. Promotion and Invitation to the 2024 conference at The Ohio State University
3. Bylaw amendment proposal
4. Appointment 2023-24 BTRA Bylaws Committee Members
5. Other

Announcements

Dates of other upcoming conferences

Adjournment



Big 10 Annual Business Meeting
Northwestern University
Kellogg Global Hub, Classroom 2110
Wednesday, August 3, 2022

Attendees Present:

Bill Williamson, Illinois

Charlie Matson, Indiana

Perry Maull, Indiana

Deb Cobb, Iowa

Al Hermsen, Michigan (until 9:30am)

Jacqie Babcock, Michigan State

Rick Vogt, Michigan State

Jan Morlock, Minnesota

Kris Mortensen, Minnesota

Julie Sweitzer, Minnesota

Pat Crews, Nebraska

Linda Major, Nebraska

Jeff Garrett, Northwestern

Erv Goldberg, Northwestern

Al Telser, Northwestern

David Zarefsky, Northwestern

Alan Cameron, Penn State

Cliff Merchant, Penn State

Jerry Day, Purdue

Larry Pherson, Purdue

Tom Robertson, Purdue

Sandi Haase, Wisconsin

Brent Haase, Wisconsin

The 2022 Big 10 Retirees Association (BTRA) Annual Business Meeting was called to order by Administrative Board Chair Al Telser, Northwestern University at 8:45 a.m. CDT.

No printed agenda was available. Chair Telsar stated agenda items to be discussed included:

- The BTRA comparison fact sheet (distribute during session)
- Bylaws and Handbook
- Expansion of BTRA

General discussion included

- The new normal and what it will look like this coming year
- Folks are tired of zoom
- As much in-person activities/events as possible
- Live streaming
- Idea of quarterly sharing sessions with specific topics

Topics raised.

- Sometimes contact information for BTRA institutions is not current on the website. Should each association be encouraged to have an official "association" email?
- Discussion about the value of membership in Association of Retirement Organizations in Higher Education.
- It was suggested that a topic for next year's meeting be a discussion of the BTRA Comparison Fact Sheet.

BYLAWS PROPOSAL

Chair Telser gave instructions as to how the discussion and approval will be handled. Bylaws Subcommittee member, Al Hermsen provided background information about the committee's work and highlighted several items within the document.]

MOTION: Al Hermsen, Michigan moved approval of the BTRA Bylaws as distributed. Seconded and carried.

9:25 Meeting recessed for Fire Drill.

9:46 Meeting resumed.

BTRA CONFERENCE HANDBOOK

Sandi Haase, University of Wisconsin shared background information about the project. The handbook will be edited to remove some comments in the Penn State report.

MOTION: E. Alan Cameron, Penn State moved to post the edited BTRA Conference Handbook on the BTRA website. Seconded. Carried.

INVITATION TO BTRA 30TH ANNUAL CONFERENCE

Sandi Haase, Wisconsin extended the official invitation to the Big 10 Retirement Associations to attend the 30th Annual BTRA conference to be held in Madison, Wisconsin on July 26-28, 2023. The Fluno Center will be the conference site. A packet of information about Madison, The Fluno Center, and a conference brochure with registration information and a tentative schedule was distributed.

MOTION: Bill Williamson, Illinois moved to extend thanks and congratulations Northwestern University Emeriti Association for a successful meeting.

Being no further business, the meeting adjourned 9:58 a.m.

Sandi M. Haase

Sandi M. Haase, Wisconsin
Secretary Pro-Tem

**BTRA Proposed Bylaw Amendments
July 2023 Annual Conference
Madison, WI**

CURRENT WORDING	PROPOSED AMENDMENT
ARTICLE III MEMBERSHIP	ARTICLE III MEMBERSHIP
<p>A. Membership is open to retiree/emeriti associations of Big Ten Conference Universities. Exception: If a conference university does not have a retirement association, the BTRA shall consider an application/ petition of a branch campus to be the institution's representative. The branch campus should be appropriately vetted before consideration of the application/petition with approval at the next convening BTRA meeting/conference. This language is not meant to interfere with individual retirement association governance.</p> <p>B. Each institution should designate two voting delegates who are members in good standing in their association. See Appendix B – Responsibilities of all Member Institutions.</p> <p>C. Each institution should also designate alternate(s) in the event a voting delegate is unable to serve their term. The alternate will be elevated to serve as the voting delegate if the voting delegate is unable to serve.</p> <p>D. Other individuals from member institutions may attend conferences and business meetings as observers without vote.</p>	<p>A. Membership in the BTRA shall consist of one retirement association from each university institution that is a full member of the Big Ten Conference as listed at https://bigten.org.</p> <p>B. If two or more retirement associations from the same university institution wish to be BTRA members, the chief academic officer of that University shall be asked to designate its BTRA member.</p> <p>No change to remaining sections -- just re-letter</p>

PROPOSED BY: Northwestern University members
 RATIONALE: The proposed wording simply and clearly describes BTRA member institutions.

PROPOSED BY: Bylaws Committee (**items highlighted in yellow**)
 RATIONALE:
 → The addition of the URL specifies where the list can be found.
 → The proposal to strike the word “university” and insert the word “institution” is purely for consistency purposes. Both the BTRA bylaws and conference handbook refer to “institutions”.

APPENDIX A - BTRA CONFERENCE ROTATION SCHEDULE

CURRENT WORDING	PROPOSED AMENDMENT
2022 Northwestern University	2022 Northwestern University
2023 University of Wisconsin	2023 University of Wisconsin
2024 The Ohio State University	2024 The Ohio State University
2025 University of Michigan	2025 University of Michigan
2026 University of Minnesota	2026 University of Minnesota
2027 Michigan State University	2027 Michigan State University
2028 University of Nebraska	2028 University of Nebraska
2029 Purdue University	2029 Purdue University
2030 Pennsylvania State University	2030 Pennsylvania State University
2031 University of Illinois	2031 University of Illinois
2032 University of Iowa	2032 University of Iowa
2033 Indiana University	2033 Indiana University
	2034 University of Maryland
	2035 Northwestern University

PROPOSED BY: Bylaws Committee
 RATIONALE: This change adds University of Maryland into the conference rotation schedule. Note: Upon adoption, the BTRA Conference Handbook will be updated.

APPENDIX C – RESPONSIBILITIES OF BTRA HOST INSTITUTIONS

CURRENT WORDING	PROPOSED AMENDMENT
<ul style="list-style-type: none"> • Ensure vetting of a branch campus application/petition is complete and ready for action. • Remind the upcoming host association to prepare for presentation an invitation to their hosted conference. This invitation should be presented at least one year prior to the event. • Review conference hosting handbook (in development) • An association will lose their place in the rotation schedule if their conference is cancelled for a valid reason, i.e., national/local disaster, pandemic, etc. 	<ul style="list-style-type: none"> • Ensure vetting of a branch campus application/petition is complete and ready for action. <p>No change to remaining bullets</p>

PROPOSED BY: Bylaws Committee
 RATIONALE: With the adoption of the amendment to ARTICLE III – MEMBERSHIP, Subsection A & B, this responsibility is no longer necessary.

2023 CONFERENCE PARTICIPANTS

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