

Suggested Guidelines for Celebrating Retirements from UMM

Parties

The Retirement/Recognition dinner held each spring is the official retirement celebration for the entire campus community. Funded by the Chancellor's office, the event is intended for everyone who is retiring. It is expected that this event serves as the primary means of honoring all those who retire from UMM. Traditions of office "cookies and coffee" parties may continue if they conform to University spending guidelines, see below. If additional parties are planned, they should generally be understood to be private parties and not part of University-funded activities or events. The University's Hospitality and Special Expenses policy includes an appendix entitled Expense Allowability Chart, which can be found at the following address: <http://www.policy.umn.edu/Policies/Finance/Misc/HOSPITALITY.html>

Invitations and Announcements

External Relations will assist in communications about retirements. The earlier we know of upcoming retirements, the better we can promote the news, assuming that the retiree desires an announcement. Sometimes advance notice is limited, but this is more the exception than the rule. Ideally we will be informed during the fall semester of retirements anticipated in the spring. In order to avoid additional costs to the campus, and to insure fair and even retirement recognition, it is desirable to avoid special invitations such as postcards and instead take advantage of ongoing communication efforts: *E-Express* (an electronic news forum sent on the first day of each month); *Profile* (a news and magazine style publication with deadlines every January and July); targeted e-mails (e.g. to all English alumni), list-serves, Weekly Bulletin, the UMMRA newsletter, and Facebook and other social media sites coordinated by University Relations. Posters or fliers may be needed for Plant Services employees without access to e-mail. Letters and cards of congratulations from alumni are often the most meaningful ways of honoring a retiree's legacy. The Alumni Relations and Annual Giving office will be of great help in reaching alumni, and our services are free.

Fundraising Projects

Please plan early! It takes longer than you think to do a good job of raising philanthropic gifts. Early consultation with development staff is important and directly impacts the success of the project.

New funds will typically not be established unless a minimum level of \$25,000 is expected. Since this is the exception and not the rule, in most cases, philanthropic gifts made to honor a retiree will be made to an already existing fund at UMM. Consultation with development staff is encouraged regarding the likelihood of achieving the \$25,000 mark. Getting to the \$25,000 total involves commitments of several lead gifts of at least \$5,000 or more before any fundraising begins.

Gifts in any amount can be contributed to honor a retiree. Philanthropic gifts made to existing funds will add up to a meaningful project. **Gifts can be made to any fund "In Honor Of name."** The

development staff is happy to recommend existing funds that support scholarships, undergraduate research, staff development, athletics, the library, or other important areas on campus. The honoree will receive notification of all special gifts made in his/her honor.

The development office will coordinate all fundraising activities following consultation with the retiree, and the retiree's division chair or department head. Fundraising to achieve \$25,000 or more should begin early in the fall semester prior to a spring retirement. Fundraising for gifts to an existing fund "In Honor Of" should begin at least 3 months in advance of the retirement event.

For questions, please contact x 6386 and ask for Maddy Maxeiner or Carla Riley. (March 2011)



UNIVERSITY OF MINNESOTA MORRIS