

U.T. DALLAS RETIREE ASSOCIATION

The University of Texas at Dallas 800 W Campbell MS AD 20 Richardson, TX 75080 Ph 972.883.2295



From the President

The hectic holiday season is past, the memories stored and the bills have trickled in, so now we look forward to the new year. I don't know if it ever gives you a turn to look at the number of the new year, 2013, and wonder, how did it get to be this far into the future? Wasn't it just yesterday when we were all anticipating the "Millennium", the scary prospect of going into the year 2000? So time moves on at an ever quicker pace (my mother warned me of this) and we all try to keep up with the new challenges.

As I write this letter to you, we are busy planning the next meeting, which will be Valentine's Day. I hope you will plan to join us as we are having a salad lunch, yes, food. We also have speakers lined up and some surprises. Bring your valentine and help us get the new year off to a good start.

Judi Hamby and her social committee have been busy putting together a calendar of activities for the coming months and you will want to hear about those at the meeting.

The planning also includes the annual new members' reception which will be on the 19th of April. Be sure to add this to your calendar and come help welcome our new members and hear a message from Dr. Daniel.

Please plan to join us for the events which you will read about in this newsletter, looking forward to seeing you soon.
A somewhat late, Happy New Year!

Marlys Damman



UTDRA Meeting: February 14, 2013
Meet, Greet and Eat begins at 11:00 a.m.
Lunch \$5.00
RSVP to Judi Hamby by Feb. 12 (judi.hamby@gmail.com)
Speakers and Surprises to follow
Room 2.902 (Training Room) of the Research and Operations Center ROC
Plenty of parking on the west side of ROC building

Membership

Membership in the UTD Retiree Association is one of the best bargains anyone on a fixed income could find! There are meetings with interesting speakers, day trips on occasion, lunches once a month and, best of all, a chance to spend fun time with the folks you interacted with differently for years!. Talk to your fellow retirees who are not members and urge them to get busy – only \$5.00 a year – and many perks. We had twelve new members join this year. Current membership:

UTD Retirees 148 (27 lifetime)

Spouses	<u>39</u>
Total	187

Jean Stuart

Board Officers

President
Marlys Damman

Vice President
Barbara Geiger

Treasurer
Gwen Bowen

Secretary
Sandee Goertzen

Membership
Jean Stuart

Members at-Large
Patsy Aguilera
Peg Zotter
Ann Payne

Social Committee
Judi Hamby

Newsletter Editor
Ekkehard Kuner

Webmaster
Chris Parr

Past Presidents
Mike Durbin
Betty Garrett
Sandee Goertzen
Chris Parr
Jo Ellen Roach
Linda Williamson
Jean Stuart

VALENTINES DAY GOODIES

The Staff Council is selling single roses, candy (regular and sugar free), and teddy bears for you to give to that special someone. They will be selling it on the 13th, but if you use the preorder opportunity which is indicated below, they will deliver it to the UTD RA meeting on the 14th which is being held at the "ROC" building. What an easy way to let that special someone know you care.

The link for the preordering is: <https://alumni.utdallas.edu/staffcouncil>

If you have any questions, or run into any trouble while preordering, just give me a call at 972-495-7612 or email me at goertzen@utdallas.edu
Sande Goertzen

Will you be our valentine?

Whitman's Chocolate 3.25 oz. Valentine's Day Teddy Bear Russell Stover Sugar-Free 4 oz.



- \$3 Roses on February 13th
- \$4 Whitman's 3.25 oz. Box of Chocolate
- \$5 Russell Stover 4 oz. Box of Sugar-Free Chocolate
- \$7 Valentine's Day Teddy Bear
- \$10 Beary Sweet Bundle (chocolate + bear)
- \$12 Beary Sweet Sugar-Free Bundle (sugar-free chocolate + bear)
- \$15 Sweetheart bundle (chocolate + sugar-free chocolate + bear)

Pre-order **online** at <http://www.utdallas.edu/staffcouncil/> and get **FREE delivery**
OR pay cash on February 13th at our table locations.

Table locations **February 13th from 11 am to 2 pm:**

JSOM 1 st Floor Atrium	ROC 2.20 Letitia Andrews
Administration 2 nd Floor Elevators	Facilities Management Lobby
Founders Building South Exit	Engineering TI Auditorium lobby
Student Union Comet Café	CBH Wendy Newton
Activity Center	



Pre-order [online](https://alumni.utdallas.edu/staffcouncil/)

Note From Anna in the Office of Development and Alumni Relations

Please save the date:

UT Dallas Awards Gala
Thursday, April 4, 2013
Renaissance Dallas Richardson Hotel
900 East Lookout
Richardson, TX 75082

A formal evite will follow.

Officer Nomination Committee Request for Volunteers

One of my duties as Past President (I would even say my only real duty) is to serve as the chairperson of the Nomination Committee responsible for putting together a slate of officers for the 2013-2014 school year. The Association members then have the opportunity at our Spring Reception Meeting (scheduled for April 19th) to elect this slate of officers (or others put forth by the membership at that meeting). The newly elected officers assume their duties on September 1, 2013.

The Nomination Committee consists of myself (Mike Durbin) as Chair and Association members Ann Payne and Gayle Poirot as volunteers duly appointed to the committee by Association President Marlys Damman. This trio of individuals now stands braced and ready to weather the torrential force of volunteers we are certain will absolutely blow us out of the water. We are brave and tested souls, however; we have faced hard deadlines and difficult decisions in the past. We have heretofore stood the onslaught of many inflamed and strident students determined to achieve their devious purposes and aims despite our own best efforts to bring order, coherence, and honesty to the process. So please, we beg you, do not run willy-nilly at us at the first opportunity and cause us injury or, even worse, spill our beverage, just so you can be first to volunteer. We promise to give each and every one of you a “fair and balanced” opportunity to provide your fellow Association members with the “cool”, “efficient”, and “highly-intelligent” leadership and decision-making skills which you have spent low these many years honing to razor-sharp perfection. In other words, please throw all caution to the wind and forget those heart-felt promises you made to yourself, your spouse, your grandkids, your pets, and President Obama that, under no circumstance, would you ever volunteer for a position on the Retiree Association’s Executive Committee. Forget all that now (like one of those old WW II zinc pennies) and concentrate on the bright glow of praise and appreciation engulfing you as you lead your Association to the very pinnacle of senior achievement.

We will accept your self-nomination with open hearts and glad hands. We especially will hold you dear to our bosom if you volunteer to be next year’s Vice-President/President-Elect nominee. This involves a three-year commitment (the third year, as Past President, is the year I’m serving now – yes, dear, I’m almost free), but what a three years it would be, full of delightful fun and frolic with your fellow Executive Committee members. Your Association’s Slate of Officers for next year will be headed up by Barbara Geiger (moving from VP this year to President next year). The other offices, in addition to VP/President-elect, are Secretary, Treasurer, three At-Large Executive Committee Members, the Membership and Social Committee Chairs, the Newsletter Editor, and the Association’s Web-Master.

Remember, volunteering is **TAX FREE!!!** Please Call! We’re on pins and needles!

Mike Durbin (mike@durbintech.com) 972-271-8779 (home) 214-558-7350 (cell)

Ann Payne (annhpayne@yahoo.com) 972-690-3998 (home)

Gayle Poirot (gpoirot@yahoo.com) 214-212-9100 (home)

Social Committee

Your Social Committee has planned a spring full of fun opportunities for food, fun and fellowship. Our successful First Monday Lunches will continue – with a new twist. We will pick a theater close to the restaurant and suggest a couple of movies starting about 1:30 for those who want to “make a day of it” and continue on to the cinema. We will announce these the week before each month’s lunch. Cinemark has reduced prices on Mondays so we thought we would give this a try.

First Monday Lunch: All lunches are at 11:30

February 4 – Rockfish at Campbell and Coit (Northwest corner) Rockfish continues to support UT Dallas Staff Council with a percentage of sales on the first Monday of the month, so we support them by eating there at least once a year. They also give a discount to UT Dallas people with a comet card anytime you dine there! Reservations: Sandee Goertzen at goertzen@utdallas.edu

March 4 – Dallas Blooms at the Arboretum. We will eat at the Arboretum after touring the spring flowers. (Details below under “Outings”)

April 1 – Holy Frijoles at 580 W. Arapaho (West of Custer and before Hampshire Lane – it sits off the street on the north side.) This family owned Mexican restaurant has \$6 lunches and \$9 fajitas on Mondays. For menu check their website at <http://www.holyfrijoles.com/menu.html>
Reservations: Ann Payne at annhpayne@yahoo.com

May 6 – Paesano’s Restaurante at 508 E. 14 Street (on the east side on Central Expressway, just south of 15th street) This is a family owned Italian restaurant with “make your own” pizzas for \$7 and entrees (including choice of soup or salad) in the \$8 to \$9 range. For their menu check out their website at <http://paesanosrestaurant.net/files/54162295.pdf>
Reservations: Gayle Poirot at gnpoirot@gmail.com

Social Outings:

February 7 – An evening of UT Dallas Basketball – Come support the Comets as they play Mississippi State! The women play at 5:30 and the men’s game is at 7:30. Games are in the Activity Center and are free to retirees on this night! Bring your Comet Card, if you have one. We will catch a bite to eat at the Student Union (a short walk away) between games. Contact Patty Atchley at patteatchley@gmail.com to be added to the free ticket list and for parking instructions

March 4 – Dallas Blooms at the Arboretum – This has become a tradition with the retirees because the bulbs in bloom just get prettier each year! We will meet at 10:00 at the entrance, and then do a self-paced tour of the gardens. We will meet for lunch at 11:30 at the food pavilion close to the entrance. The cost is \$12 for seniors plus \$5 for parking. (Make friends with a retiree who has a membership to get free admission!) For more information check out their website at <http://www.dallasarboretum.org>



For reservation contact Mike Durbin at mike@durbintech.com

Early May (date to be determined) – The Perot Museum

The Perot Museum of Nature and Science located in Victory Park, near Downtown Dallas is said to be a "world of wonder" by *The Dallas Morning News*. Passing the test of school children, inspiring curiosity in all ages and boasting as a living science lesson, this new Museum opened its doors to the public on December 1, 2012. Get ready to amaze your brain through hands-on learning experiences.

Details on this trip will be available soon! For more information about the Perot Museum, check out their website at <http://www.perotmuseum.org>. Tickets will need to be purchased in advance, so look for ticket information and deadlines in your email soon!



Come join us for any or all of our social events this spring – and bring a retiree we haven’t seen for a while!

First Monday Lunch: November 3, 2012 at Urban Rio in Plano



McKinney Lunch and Tour: November 2012



Holiday Luncheon:
December 12, 2012,
at Compari's Italian
Restaurant



UNAPPROVED

The University of Texas at Dallas
Retiree Association Minutes
General Membership Meeting
November 8, 2012

Members Present: David Blair, Gwen Bowen, Marlys Damman, Dottie Dunkelberger, Mike Durbin, Betty Garrett, Barbara Geiger, Sandee Goertzen, Judi Hamby, Eloise Jackson, Tiah Lambert, Mike Leaf, Lew Lewis, Mickey Lewis, Ruth Oldham, Deborah Stott
Visitors Present: Paula Bratt, Deb Day, Rachel Edward, Anna LeBlanc

SPEAKERS:

Dr. Rachel Edward from the UTD Center for Vital Longevity, gave a brief presentation about the work the Center is going. Volunteers are needed for studies that investigate brain activity and memory. Anyone interested should go to the web site for further information.

Anna LeBlanc, the Director of Gift Planning of the UTD Office of the Vice President for Development gave a brief presentation about the benefits of donating funds from retiree's retirement plan. Anyone interested in finding out more information should contact Ms. LeBlanc.

1. CALL TO ORDER

President Marlys Damman called the meeting of the UTD RA to order.

2. MINUTES

The minutes of the September 11, 2012 were reviewed and a motion was made and seconded to approve the minutes as submitted. A vote was taken and the minutes were approved.

3. TREASURER'S REPORT

Gwen Bowen, Treasurer of the UTD RA, gave her report which included a balance in the checking account of \$5,623.10.

4. SOCIAL COMMITTEE REPORT

Judi Hamby, Social Director, gave a report on the events that are scheduled for the fall/winter months. They include the lunches on the first Monday of the month. Also planned is a day in McKinney on November 13th, as well as the Christmas luncheon in December.

5. ACADEMIC SENATE REPORT

Chris Parr was out of town so there was no report.

6. STAFF COUNCIL

Sandee Goertzen, the liaison to the Staff Council from the UTD RA, reported that the Staff Council continues to meet the second Wednesday of the month. Twenty-seven scholarships were given out to staff members the previous year. Fund raising by the Council includes selling valentine balloons and candy, recycling ink cartridges, and selling poinsettias and Christmas cactus plants.

The new Assistant VP for Human Resources continues to attend the meetings to keep the members up to date on the latest changes in HR. She is working on a career path program for staff.

The People Soft change is still a major problem for all of the campus. Dr. Daniel is keeping close tabs on this project. The deductions for our insurance were messed up, as a result of the People Soft project.

7. NEW BUSINESS

A. REPORT FROM AROHE:

Barbara Geiger reported on her trip to the University of North Carolina to attend the 10th anniversary meeting of the Association of Retirees of Higher Education. There were 137 members present from 70 Colleges and Universities. Several interesting topics were discussed. One was preserving memories on the scrapbook pages. SAIL, which stands for “Seniors Active In Learning” was another topic. The recommendation was for retirees to continue socializing and continue an intellectual activity.

Barbara talked about the fun things that they also did which included a reception at the President’s house, listening to a jazz band, and visiting Raleigh’s newest art museum.

B. Town Hall Meeting

Sandee Goertzen reported on Dr. Daniel’s Town Hall meeting. He expressed how pleased he is as to where UTD is right now. Headcount for the Fall semester is 19,800 – the projection for Fall 2017 is 24,558. The average SAT For 2011 was 1,248 and for 2012 it is 1268 which is the highest in the States. Last year there were 53 National Merit Scholars, this year there are 63. Our 4-year graduation rate is 55% - better than Austin at 51% and A&M at 52%.

Regarding state funding: In 1990, for every \$1 in tuition, the state gave us \$4.20. In 2012 for every \$1 in tuition the state gives us 40 cents.

It was also announced that at the end of the third year in the five year \$200,000 campaign, they have received \$123,000 so they are ahead of schedule.

Consideration is currently being given to renaming streets and residence halls. Phase V housing will be opened next fall, with the final one in another two years. The ATEC building is scheduled to open summer 2013. The School of Management addition will be ready in Fall 2014. Parking garages are going to be built, one at the SOM, one at the residence hall and one south of NSERL. NSERL 2 is on the drawing board. The campus now has six buses that serve the campus and they operate on weekends also. There are 14 new passenger shuttles – called Comet Cabs. There is a campus food van that sells “whoosh” burgers and “whoosh” dogs. There are ten electric charging stations on campus and six zip cars. Four new soccer fields and ten new tennis courts are going to be built. Current tennis courts are to be moved to the athletic complex.

Dr. Daniel mentioned Challenges on campus to get to Tier One:

Freshmen enrollment increase; strengthen Ph.D. programs; Ph.D. program in Mechanical Engineering; Continuing People Soft improvements; Top Tier administrative processes; managing budget constraints; and meet expanding space needs.

8. ADJOURNMENT

There being no further business, the meeting was adjourned.

Respectfully Submitted,
Sandee Goertzen, Secretary

Note from the Newsletter Editor:

Please look for updated information from the UTDRRA on our website: www.utdallas.edu/ra/



It's Now Easier to Make Your Gift through Your IRA

The IRA Charitable Rollover was extended through December 31, 2013 as a provision of the American Taxpayer Relief Act of 2012. The IRA Charitable Rollover allows individuals age 70½ and older to make direct transfers totaling up to \$100,000 per year to 501(c)(3) organizations, without having to count the transfers as income for federal income tax purposes.

- **Who qualifies?** Individuals who are age 70½ or older at the time of the contribution (you have to wait until your actual 70½th birthday to make the transfer).
- **How much can I transfer?** \$100,000 per year.
- **From what accounts can I make transfers?** Transfers must come from your IRAs directly to The University of Texas at Dallas. If you have retirement assets in a 401(k), 403(b) etc., you must first roll those funds into an IRA, and then you can direct the IRA provider to transfer the funds from the IRA directly to The University of Texas at Dallas.
- **To what organizations can I make gifts?** Tax exempt organizations that are classified as 501(c)(3) organizations, including The University of Texas at Dallas, to which deductible contributions can be made.
- **Can I use the rollover to fund life-income gifts (charitable gift annuities, charitable remainder trusts, or pooled income funds), donor advised funds or supporting organizations?** No, these are not eligible.
- **Can I use the rollover to support a particular purpose of The University of Texas at Dallas?** As with all other gifts, you can direct your IRA Charitable Rollover gift as you see fit. However, you cannot direct your gift for a purpose from which you receive a personal benefit, goods, or services in return, such as a gala ticket, to purchase items at a silent auction, etc.
- **How will The University of Texas at Dallas count the gift?** We will give you full credit for the entire gift amount.
- **What are the tax implications to me?**
 - Federal — You do not recognize the transfer to The University of Texas at Dallas as income, provided it goes directly from the IRA provider to us. However, you are not entitled to an income tax charitable deduction for your gift.
 - State — Each state has different laws, so you will need to consult with your own advisors. Some states have a state income tax and will include this transfer as income. Within those states, some will allow for a state income tax charitable deduction and others will not. Other states base their state income tax on the federal income or federal tax paid. Still other states have no income tax at all.
- **Does this transfer qualify as my minimum required distribution?** Once you reach age 70½, you are required to take minimum distributions from your retirement plans each year, according to a federal formula. IRA charitable rollovers count towards your minimum required distributions for the year.
- **How do I know if an IRA charitable rollover is right for me?** If you are at least age 70½ and

- You do not need the additional income necessitated by the minimum required distribution, OR
- Your charitable gifts already equal 50% of your adjusted gross income, so you do not benefit from an income tax charitable deduction for additional gifts, OR
- You do not itemize deductions, OR
- You are subject to income tax deduction and exemption phase outs
- **What is the procedure to execute an IRA charitable rollover?** To complete an IRA charitable rollover, the first step is to contact your IRA provider to learn their procedures. We also offer sample letters (see website www.utdallas.plannedgiving.org) you can send to your IRA provider to initiate a rollover. Make sure that you contact us when you direct the rollover so we can look for the check from your IRA provider.

UT Dallas Planned Giving Website

www.utdallas.plannedgiving.org

Anna LeBlanc, CFRE

Director of Gift Planning

Office of Development and Alumni Relations

The University of Texas at Dallas

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