



THE UNIVERSITY OF BRITISH COLUMBIA

UBC Emeritus College

Strategic Planning Leadership Retreat

2023-24 Action Plan

Prepared by

... **MAY** COMMUNICATIONS

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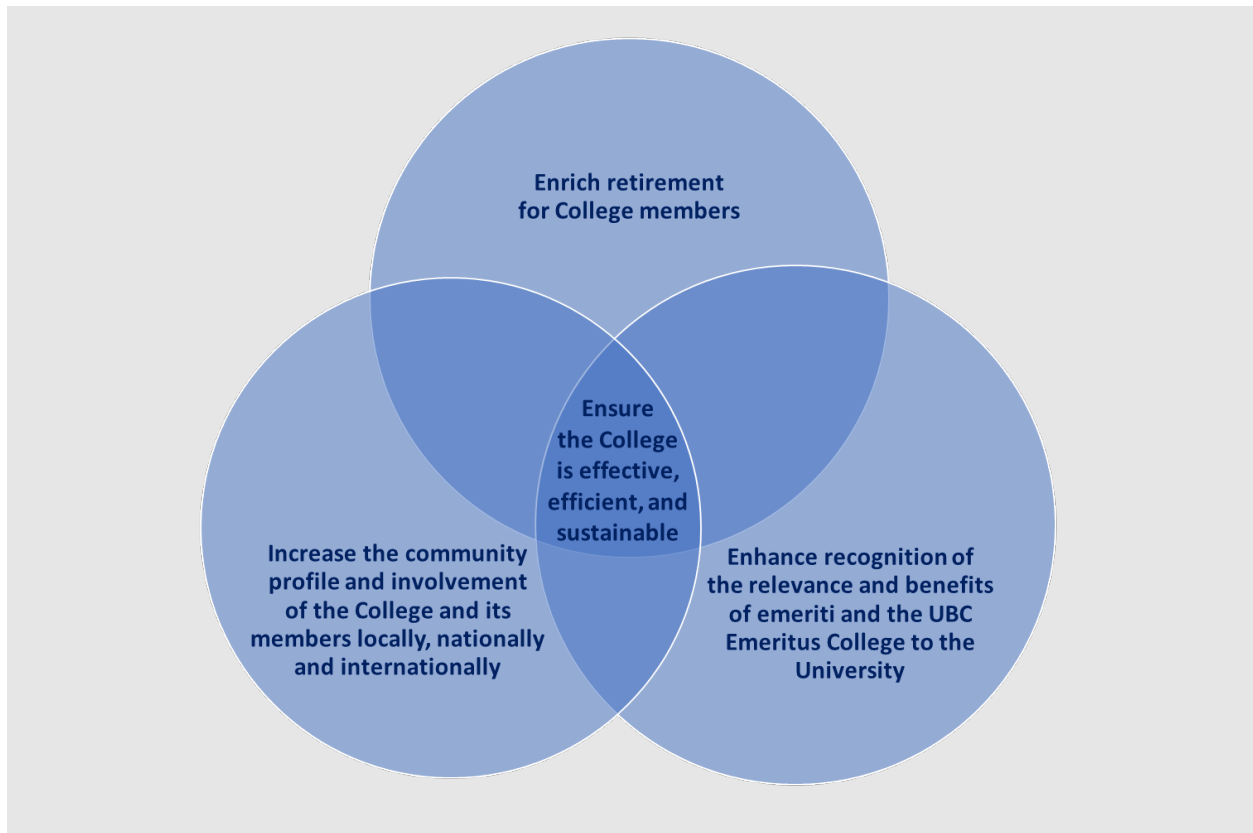
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INTRODUCTION

The [University of British Columbia Emeritus College](#) (UBC EC) supports faculty members, senior academic administrators, librarians, and other invited members as they transition into retirement and enables UBC emeriti to continue contributing to the university and society. Emeriti contribute to academic work at UBC and the university's reputation through lecturing, mentoring, research and publishing, participating in university committees and external community organizations, and more.

The college executive, council members, committee chairs, and staff developed a new strategic plan in fall 2022, setting out four strategic priorities for the UBC Emeritus College in 2023-25:



On September 21, 2023, UBC EC leaders and staff gathered at a retreat to review accomplishments to date in implementing the [UBC Emeritus College Strategic Plan 2023-2025](#) and co-create action plans to continue its successful implementation.

This report outlines achievements to date in the first year of the UBC EC strategic plan and identifies an action plan to continue the successful implementation of each strategic priority.

Quarterly monitoring will be used to gauge progress and produce data for the Provost to prove accountability and value to the community, university and society.



CONTEXT

Past Principal Anne Junker explained the impetus for developing a strategic plan was to identify priorities to shape the vision for the UBC Emeritus College in program delivery and resumption of in-person activities post-pandemic. The College also developed a strategic communication plan in Fall 2022 to support implementation of the strategic plan.

Much has been achieved; much remains to be done. Anne provided a high-level overview of accomplishments so far:

IMPLEMENTING OUR STRATEGIC PLAN: YEAR ONE

PILLAR 1 – Enrich retirement for College members

The UBC Emeritus College has been involved in a remarkable number of presentations and events:

- Co-sponsored with Faculty Relations:
 - Three retirement workshops on options and benefit plans
 - ~220 faculty participants
- Held 103 events:
 - 59 meetings of 8 Special Interest Groups
 - 44 speaker events involving 72 speakers and attracting 1398 attendees

PILLAR 2 – Increase the community profile and involvement of the College and its members locally, provincially, nationally, and internationally

The UBC Emeritus College organized speakers from national and international organizations about volunteer opportunities in community work:

- Volunteer SIG heard about opportunities to get involved in volunteering from:
 - 13 speakers from seven national and international organizations
 - Six members

PILLAR 3 – Enhance recognition of the relevance and benefits of emeriti and the Emeritus College to the University

Recognition of the impressive commitments of emeriti is crucial to raise awareness and demonstrate the value of UBC EC and individual emeritus' ongoing contributions to the university:

- **AWARDS**
 - Two President's Awards for Distinguished Service
 - One UBC EC Award for Excellence in Innovative & Creative Endeavours
- **HONOURS**
 - Five emeriti newly invested in the Order of Canada
 - 24 members have received the honour since the UBC EC was established



- **RECOGNITION**

- Reimbursed 19 emeriti from 15 departments **\$27,855 for scholarly activities** (down compared to pre-pandemic travel)
- UBC data show 70 emeriti are Principal Investigators **on grants totalling ~\$4.5M**; many more work as co-investigators, collaborators and mentors
- Emeriti represent **20% of UBC academics** with >100 listed as experts with UBC Media
- **Emeritus Climate & Nature Emergency Cohort, a collaboration with the PWIAS**: nine scholars, seven faculties, 12 outstanding speaker events
- Promoted coding in Workday for emeriti who hold Post Retirement Appointments while they continue to undertake professional activities

PILLAR 4 – Ensure the College is effective, efficient, and sustainable

The College has a growing pool of members to welcome but continues to lack ways to attract new volunteers to the College leadership and numerous committees. There are plans to hire a communications coordinator.

- Welcomed 117 new emeriti and 6 elected members
- Welcomed two new staff:
 - Administrative Assistant Queenie Law
 - Events and Communications Coordinator Sarah Close Humayun
- Met with the interim president, provost, deans, department heads and directors to cultivate continuing support for the College
- Worked with UBC Communications on College branding

THE COLLEGE TODAY

Principal Paul Harrison noted the UBC Emeritus College is in an enviable position among faculty retiree organizations in Canada and the US. Most operate with extremely limited funding, while the College receives annual funding from the provost which supports 0.6 FTE staff.

The College has seen remarkable growth in the scope of activities in the past decade. At present, UBC EC activities are achieved by the dedicated efforts of three part-time staff members and nearly 40 passionate volunteers. Administrative Manager Sandra van Ark presented an overview of staff support for UBC EC activities in eight areas:



- **Event Coordination and Management** – Emeriti events have increased from 25 in 2012 to upwards of 100 events last year
- **Finance Administration, Accounting and Reporting** – Staff handles work within UBC systems that used to be done by a Treasurer and the Alumni Office
- **Membership Administration** – In the previous Association for Professors Emeriti (APE) volunteer Don Russell processed membership fees and database updates; there are no longer membership fees and database updates are now handled by EC office staff.
- **Communication** – Don Russell also handled the APE e-news, website, newsletter, etc., which is now handled by EC office staff
- **Committees** – Staff support committee meetings and work, and have developed a handbook for Executive Council members
- **Human Resources** – Onboarding new staff members requires training and resources
- **Office Administration** – The staff team manages and runs the UBC EC office
- **Project Management** – Ongoing projects are managed as they arise, such as the move to Brock Commons, symposiums, conferences, implementing the UBC central admin system, Workday, and continuing to address IT issues for college members.

UBC EC Financial Status

The College has developed a surplus during recent years, from a small rebate on insurance that members purchase, lower reimbursement amounts for scholarly activities and lower expenses for (online) General meetings during the pandemic. The surplus is now being used to pay staff hired to meet the demands of college activities and embark on the most impactful activities to:

- Show the College is meeting strategic goals
- Demonstrate the value the College brings to its members, UBC, and society
- Prove the need for an increased allotment to sustain ongoing College activities

With these goals in mind, the UBC EC Executive has agreed to support an ambitious second year plan for the [Emeriti Cohort in the Wall Catalyst Program on the Climate and Nature Emergency](#), which will involve developing a video resource to communicate activities and foster discussions.

College Communications

The College needs to continue to focus on achieving goals in the communications plan and has committed to hiring a communications coordinator to expand capacity and implement a strategic communications program including considering a website refresh and ways to engage younger emeriti.

In addition, the UBC EC will move into its new space in summer 2024 and plans to hold a grand opening in the fall to showcase the College to others at UBC.



PROGRESS UPDATES: JANUARY 2023 TO TODAY

PILLAR 1 – Enrich retirement for College members

Bill McCutcheon, UBC EC Vice Principal, and Paul Marantz, Retirement Matters Cluster Coordinator, presented an overview of the objectives for the Pillar 1 working group, which sought to balance support for new initiatives with continuing regular activities:

2023 Objectives

- Raise awareness of the Emeritus College among those approaching retirement, newly retired and already retired, including potential members other than senate-approved emeriti
- Improve communication about retirement transitions
- Maintain and enhance benefits and privileges awarded to retired faculty by UBC and negotiated by the College with other insurance agencies for members
- Provide programs aimed to inform and stimulate members to engage with each other beyond disciplinary boundaries
- Provide opportunities for social interactions amongst members

Activities in 2023 to Enhance Transition to Retirement and Life in Retirement

New Initiatives

- **Progress in meeting with the Provost, deans and department heads** to raise awareness of the College's support for faculty approaching retirement
- Meet with the new President and plan for him to attend a general meeting
- There is a desire for **an annual in-person welcome** and information meeting for new retirees

Continuing Actions

- Partnering with Faculty Relations on **pre-retirement seminars** (2-3 per year serving ~150 faculty)
- Coordinating with the **Faculty Pension Plan**, including an annual Faculty Pension Forum
- Liaising with UBC Administration and insurance companies to **maintain and enhance benefits**
- Updating, revising and augmenting **UBC EC website materials** on retirement transition and benefits and responding to member questions
- 5 General Meetings with stimulating invited speakers
- a themed seminar program in partnership with Green College
- 8 active Special Interest Groups allow members to connect with others while exploring on-going or new interests

New Email Forum

UBC EC staff has created a new email forum for UBC EC members, modelled after a successful list-serve in the Dunbar community. The forum will assist members in a variety of ways, from the mundane and practical to more consequential—for example, a source of referrals for those seeking a reliable plumber



or electrician, accommodation requests or opportunities, volunteer opportunities, event and meeting announcements, and more. The group will send an email inviting all UBC EC members to enrol.

PILLAR 2 – Increase the community profile and involvement of the College and its members locally, provincially, nationally, and internationally

Council Member Nancy Gallini outlined the progress to date toward the objectives for Pillar 2:

Objective 1: Increase and support contributions by College members in addressing major societal issues

- **Climate and Nature Emergency seminar series** – A cohort of UBC EC emeriti participates in this project, which began in 2022 as a collaboration with the Peter Wall Institute for Advanced Studies (PWIAS), which involves:
 - Year 1 (2022/23): Speaker series on a variety of topics (completed)
 - Year 2 (2023/24): Organize interdisciplinary group discussions on alternative approaches to address this meta-crisis, with a video produced for wide distribution (funding committed for next two years)
- **UBC Indian Residential School History and Dialogue Centre** – About 30 emeriti attended a presentation as an initial step to learn about the centre's work and consider activities the UBC EC might engage in to contribute in meaningful ways

Objective 2: Identify and promote opportunities for Emeriti to participate in communities locally, nationally and internationally

- **Community Volunteer Group (CVG)** – This SIG was launched in January 2022 to:
 - Raise awareness of and interest in volunteer opportunities – Speakers from community organizations like Atira Women's Resource Society, MOSAIC, Academics Without Borders, Doctors Without Borders, etc., discussed volunteer needs and opportunities with CVG members
 - Learn about volunteer activities emeriti currently engage in
- 2023-24: Move Community Volunteer Group activities primarily to the website:
 - *Part 1 of revised CVG:* Identify and **update community needs online quarterly**, through continuous contact with a list of 50-100 local, national and international non-governmental organizations

Objective 3: Increase the reach and quality of external communications about the College and its members to communities at all levels

- *Part 2 of revised CVG:*
 - Develop a survey tool to **identify volunteer activities by College members**
 - Make survey **results available on the UBC EC website**, classified by volunteer area (e.g., climate, truth and reconciliation, health, education, etc.) and to local, national and international communities
 - Organize **two hybrid sessions a year for College members** to share their volunteer experiences



Objective 4: *Increase collaboration with emeriti groups throughout Canada, particularly those similarly engaged in community outreach and societal issues*

- The UBC Emeritus College is a **member of national and international organizations**:
 - CURAC (College and University Retirees Associations of Canada) – UBC, University of Victoria and Simon Fraser University co-hosted a conference for CURAC in May 2022
 - AROHE (Association of Retiree Organizations in Higher Education) – In the US and Canada; the UBC EC contributes regularly to AROHE’s newsletter
 - EAPE (European Association of Professors Emeriti) – Several emeriti are contributing a supplement to the newsletter on “life after retirement” for EAPE’s recognition of the UN World Day of Older Persons on October 1, 2023
- This pillar group has **connected with other universities** impressed by UBC EC activities that would like to get involved with the College

PILLAR 3 – Enhance recognition of the relevance and benefits of emeriti and the Emeritus College to the University

Paul Harrison explained the key objective for this pillar is to demonstrate with data that UBC EC and individual emeriti—in alignment with the UBC Strategic Plan—contribute to:

- **Supporting critical academic and administrative functions**
- **Enhancing the reputation of individual academic units and UBC as a whole**

Some progress has been achieved, but getting access to UBC EC and emeriti data has been an ongoing challenge for the College, as described in the table below:

Challenges demonstrating the value of emeriti contributions with data

STRATEGY	ACTION	DONE?	CHALLENGES
Ensure heads of academic units value emeriti and know about the UBC EC	Productive meeting to introduce UBC EC to deans, heads and directors	Good first step	Limited time at large, online group meetings for a meaningful exchange of ideas
Show that UBC EC programs attract emeriti	Routinely collect data on attendance	Some	What is considered “success”?
Generate lists of emeriti achievements, awards, volunteer activities, etc.	Encourage self-reporting Encourage reporting about colleagues	Some	Lack of response to email/surveys Inactive “unit rep” group
Generate lists of research, teaching, grad supervision, etc., by emeriti	Establish system for routinely obtaining data within UBC	No	Variation in how emeriti are acknowledged in academic units and coded in administrative units



- The Pillar 3 group wants to engage deans, heads and directors in more in-depth discussions as to how the College can support their needs
- In addition, success should be defined—more participants, more volunteers, other factors—to demonstrate how emeriti contribute to UBC
- Gathering data on emeriti achievements and activities will require
 - Developing better communication tools to encourage more members to report regularly on their involvement in continuing scholarly activities, service to their department or to UBC at large, and contributions to volunteer organizations locally, nationally, and internationally
 - re-engaging the unit rep group to ensure each area has a rep for two-way communications about the UBC EC. A meeting is planned for early 2024
 - Developing a system to gather data is challenging, as UBC data systems are piecemeal, incomplete and difficult to obtain data from:
 - Work is underway to ensure IT routinely codes emeriti in the Workday admin system, but isn't fully in place yet
 - HR reports that there are ~200 retired faculty with post-retirement appointments coded in Workday; HR provides lists to the EC office regularly and there is discussion for the college to undertake a survey of these individuals to ask about their activities and time commitment

PILLAR 4 – Ensure the College is effective, efficient, and sustainable

Past Principal Joost Blom and Sandra van Ark highlighted four objectives from this group:

Communication Strategy

- *Objective: Develop a robust communication strategy to increase recruitment to and engagement with the College*
- **Desired Outcome:** The UBC Emeritus College is widely recognized as effective by emeriti and UBC, with more emeriti engagement

Operationalization

- The UBC EC is explained and highlighted in the UBC Retirement Planning workshops *which are co-sponsored by the Transitions to Retirement Committee and UBC HR/Faculty Relations*
- Ensure retiring and retired faculty who need to apply for emeritus status are aware of this possibility – Faculty Relations sends an email to tenure-stream faculty over the age of 55, which does not include clinical faculty and others (research associates, sessional lecturers...) at present
- Organize 1-2 events a year for incoming members, separate from the President's reception – *Yet to be done*
- Encourage new members to fill out the intake form indicating their *interests* – The response rate for



forms was just 14 out of 117, or 12%-- and ensure systematic contact with each respondent to invite their involvement

- Do an inventory of all communications with members – The group is planning to switch to MailChimp to get a better sense of the reach of newsletters, emails, SIGs communication, etc.

Unit Representatives

- **Objective:** *Enhance the role of unit reps through two-way communication*
- **Desired Outcome:** We have functioning unit reps for all units, actively involved in the College's operations

Operationalization

- Develop clear guidelines for the role of unit reps – The role is currently being reviewed
- Reinstate annual information program for the unit reps – *Proceeding with unit rep meeting on March 2, 2024*
- Communicate regularly with unit reps through the year and seek feedback – Staff is working on the number/purpose of these communications throughout the year
- Confirm that the Membership Committee chair is responsible for unit reps

Roles

- **Objective:** *Clarify the roles of everyone involved in the College*
- **Desired Outcome:** Well defined roles and responsibilities provide clear direction to the College mission (on all levels – staff, committees, Council)

Operationalization

- Develop job descriptions for volunteers/committees and correlate with job descriptions for the staff supporting those committees – Templates are being created to clarify roles, guide volunteers/committees and staff on respective responsibilities, and ensure volunteer recruitment sets out clear expectations

Volunteer Leadership Continuity Plan

- **Objective:** *Implement a robust, sustainable volunteer leadership continuity plan to:*
 - *Increase member participation in College structures and activities*
 - *Create a succession pipeline*
- **Desired Outcome:** Volunteer recruitment and replacement plans guide successful leadership continuity

Operationalization

- Develop committee membership guidelines for expectations on length of term commitment and succession system, and ensure each committee has both a chair and a vice-chair, with the latter presumptively to succeed the chair – *The College relies heavily on volunteers and needs a succession system to identify a steady supply of people over three years to ensure sustainability*
- Use the information on member intake forms to identify potential volunteers – The forms can help identify areas of volunteer interest



- Involve all council members, committee chairs/members, and unit reps in the process of identifying new volunteers – The goal is to establish two-way communication protocols between Executive and committee chairs about succession and recruiting new volunteers

CROSS PILLAR THEMES

Leadership retreat participants broke into four discussion groups, one focused on each strategic priority. For each priority, the groups:

- Considered work already underway or completed toward achieving the strategic plan objectives
- Identified ways to build on accomplishments to date and lay the groundwork for what will follow in subsequent years
- Planned for SMART implementation: *Strategic, Measurable, Achievable, Realistic and Time-constrained*

Common cross pillar themes for the College emerged during these discussions that underpin the organization's long-term sustainability:

SUCCESSION PLANNING

Participants acknowledged the long service of many at the session, while also pointing out the foundational importance of recruiting additional EC members to participate in leadership positions and committee memberships to ensure succession and sustainability across UBC EC's scope of activities.

COMMUNICATIONS

Strengthening communications is crucial to:

- Raise awareness of College contributions at all levels of the University
- Successfully implement all four pillars' objectives and activities
- Showcase the story of how UBC EC has moved beyond supporting internal interests to also participating in university, community and societal issues, in a remarkably short period
- Increase connections across pillars to support a more horizontal evolution for the organization

In addition, a return to in-person interactions will help sustain the spirit of community so important to UBC EC members. Participants remarked on the enthusiasm and energy of everyone at the meeting, which enabled the group to accomplish more in person than would have been possible via zoom.

RESOURCES

The College relies on continued funding support from the highest levels at UBC, so raising and sustaining awareness of UBC EC's contributions with UBC leaders remains an important priority, in addition to seeking new sources of funding.

Increasing access to data on the contributions of UBC emeriti, mainly from the individuals themselves, is key to reporting on these accomplishments.



Session participants also noted the outstanding quality of human resources supporting the College—competent, effective staff and diverse, energetic volunteers. Note that 1.8 of the current 2.4FTE is not funded by the University.

FUNDRAISING

The UBC Emeritus College has increased its staff to support current programs and initiatives; the gap between the 0.6 FTE supported by the Provost's office and 2.4FTE in place is offset by other funds which will be depleted by 2025. Consequently, new funding sources will be needed to sustain the scope of existing projects and new initiatives in the UBC EC Strategic Plan. The plan is to make a case to the Provost that the current level of activity, i.e., about 100 events a year, is proving its value in advancing both the EC Strategic Plan and UBC's Strategic Plans and thus the Provost should be providing the base funding to support that work. If new initiatives are identified that could add further value, then a fundraising program should be developed.

Session participants suggested developing ideas that create a strong case for a fundraising campaign. To make the case for a successful campaign requires a compelling value proposition, robust plan, and strong case statement; specific projects will need to benefit the College, emeriti and UBC.

- Most staff in the UBC Development and Alumni Engagement office are members of the [Association of Fundraising Professionals](#); request a presentation on the hallmarks of fundraising success to learn about effective campaigns
- UBC EC needs to reactivate its Development Committee to undertake this effort and work on:
 - Potential effective, priority projects identified by Council
 - Why the case is compelling, who will be involved, and why people will want to invest

The central UBC development office may be able to offer support if the College has a strong project proposal:

- Emeriti give more to the university than alumni; data from the UBC development office makes a case to focus fundraising on emeriti, in addition to alumni. However, emeriti are inclined to contribute to their former units or areas of special interests.
- some emeriti also make regular designated donations to the College

IDENTIFY PRIORITIES

Session participants noted the sheer size and scope of activities discussed at the meeting. Consequently, it will be important to set realistic priorities to focus on in the coming year and enable implementation with available resources.

VALUE ADDED

Highlighting UBC EC's unique value within the university will underpin the case for support among UBC leaders and for potential fundraising opportunities.

When faculty make the transition to retirement, some of the drivers guiding their efforts may shift—promotion, salary, research grants, etc., are not as influential for many. Emeriti have the time and



freedom to focus attention on intellectual ideas, interests and activities of choice, offering UBC the opportunity to harness a unique interdisciplinary resource.

ALIGNMENT WITH UBC STRATEGIC PLAN

Participants noted the importance of aligning College priorities and activities in support of the four core areas in the [UBC Strategic Plan](#). Some highlights of UBC EC's alignment include:

- **People and Places**
 - College programs empower UBC emeriti to continue contributing to the university and society
 - SIGS provide a range of opportunities to engage in activities of personal interest and societal importance
- **Research Excellence**
 - 70 emeriti are Principal Investigators on grants totalling ~\$4.5 million
 - Emeriti awards, honours and recognition contribute to the university's reputation for research excellence
- **Transformative Learning**
 - Emeriti make up 20% of UBC's academics and many have had a role in training, mentoring and recruiting current faculty, and in establishing programs/centers/schools for which UBC is recognized internationally
- **Local and Global Engagement**
 - UBC EC initiatives demonstrate a broad scope of local and global engagement, including:
 - The Emeritus Climate Cohort in the Peter Wall Catalyst Program on the Climate and Nature Emergency
 - UBC EC's commitment to Indigenous truth and reconciliation
 - Annual seminar series in collaboration with Green College
 - Emeriti participation in community volunteerism
 - UBC EC membership in national and international organizations

As the College moves forward with activities toward implementing its strategic plan, continuing to showcase contributions and alignment with the broader university plan will be an important part of sustaining awareness.

NEXT STEPS

The action plan for 2023-2024 and beyond, starting on the next page, reflects these themes and:

- Identifies a set of priority 2023/24 objectives and activities
- Defines outcome measures that will demonstrate achievement of the objectives
- Identifies dependencies, particularly from other pillars
- Where possible, indicates who will do the work and by when



ACTION PLAN: 2024 AND BEYOND

PILLAR 1: Enrich Retirement for College Members						
Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
1) Raise awareness of UBC EC among faculty, including clinical, approaching retirement	<ul style="list-style-type: none">Faculty make greater use of the transition to retirement resources on UBC EC's websiteFaculty are more likely to be active in the UBC EC when they retire	<ul style="list-style-type: none">Work with Faculty Relations and the Provost to ensure that clinical faculty are fully integrated into the process for obtaining emeritus status and thus in activities described belowContinue to describe the College/activities at Retirement Planning workshops, clarify that emeriti automatically become members, and that there is a process to elect others as membersReach faculty through department heads (see #2 below)Connect with Council members and Unit Reps to identify departments doing a good job with faculty and emeriti; identify priority areas for follow upPay attention to tenure/non-tenure tracksEnhance the role of unit reps with expectations set out in job descriptions		<ul style="list-style-type: none">Transitions to Retirement committee (Linda Leonard, lead)Unit Reps lead, Chair, Membership committee (David Hill)		
2) Increase appreciation of and support for the UBC EC among deans and unit heads	<ul style="list-style-type: none">Deans and unit heads will inform unit members about the UBC EC and its resources, recognizing the	<ul style="list-style-type: none">Set up an ad hoc working group to develop an action plan:<ul style="list-style-type: none">Designate a ChairGather information on what has already been done to inform deans and unit heads about the UBC EC	Group established by October 31, 2023 January 31, 2024	<ul style="list-style-type: none">Possible working group members:<ul style="list-style-type: none">Nancy GalliniPaul HarrisonAnne JunkerLinda LeonardPaul Marantz		

**PILLAR 1: Enrich Retirement for College Members**

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
	College facilitates faculty retirement <ul style="list-style-type: none">Deans and unit heads will be more supportive of UBC's continued funding of the UBC EC	<ul style="list-style-type: none">Draw upon the experience and ideas of those who have done this workDecide the next steps needed to build upon the work already doneDecide who should approach the unit headsDetermine what presentation/materials department heads need for faculty members thinking of retirementOrganize materials (e.g., slides, handouts, statistics, outline of major talking points) to assist in presentationsDecide whether UBC EC will ask for time to make a short presentation to some unit membersApproach deans and unit heads	Spring 2024	<ul style="list-style-type: none">Bill McCutcheonPaul SteinbokGraeme Wynn		
3) Continue present programs and activities for existing members, with attention to sustainability and interest levels		<ul style="list-style-type: none">Continue to emphasize member benefits and needsContinue to gather feedback regarding the effectiveness of programs and presentations, plus ideas for new presentations			What is a suitable measure of "effectiveness"?	
4) Increase awareness of the programs and SIGS that UBC EC has to offer		<ul style="list-style-type: none">Develop materials on UBC EC:<ul style="list-style-type: none">Canned presentations for department heads to better inform facultyFocus on "future emeriti" versus retirees		Chair of Membership?		



PILLAR 1: Enrich Retirement for College Members

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
		<ul style="list-style-type: none">• Increase impact of letter/form to new emeriti with personal follow up contact to welcome people to activities of interest				
5) Evaluate current programming to identify the need for adaptations as member needs change 6) Determine ways to connect personally with members to learn about their interests and invite participation: those new members who indicate their interests on admission forms; those attending meetings		<ul style="list-style-type: none">• Continue to explore options for in-person events• Explore ways to connect with a potential participant (EC Principal? Chair of a needy committee? An existing EC volunteer who might know the person...)				



PILLAR 2: Increase the community profile and involvement of the College and its members locally, provincially, nationally, and internationally						
Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
1) UBC EC members contribute to societal issues	<ul style="list-style-type: none">• UBC EC members:<ul style="list-style-type: none">○ Make an interdisciplinary contribution to knowledge translation (KT)○ Help address roadblocks faced by KT	<ul style="list-style-type: none">• Support the year two Climate & Nature Emergency cohort• Broaden interaction with youth• Broaden public engagement	Year 2	Olav Slaymaker Emeritus College Cohort (ECC) Nancy Gallini	<ul style="list-style-type: none">• Review previous year's program metrics• Set a goal for number and type of messages used to advertise events• Set a goal for attendance at events• Establish new UBC EC partners with a strong Indigenous and climate commitment (e.g., Knowledge Network)	Key need for: <ul style="list-style-type: none">• ECC cohort participation and leadership• Admin support (Sarah Close Humayun)• Budget for broadening program scope• Potential fundraising area: Showcasing Indigenous practices and climate focus for sustainability of humanity
2) Promote volunteer opportunities for UBC EC members	<ul style="list-style-type: none">• More outputs that contribute to societal debates (e.g., editorials)• UBC EC plan to broker matching of organizations needing volunteers with people wanting to volunteer	<ul style="list-style-type: none">• Gather data on existing emeriti activities (e.g., via survey, personal outreach)• Explore options for a database platform of volunteer activities and opportunities:<ul style="list-style-type: none">○ Data collection	May 2024 2023/24		<ul style="list-style-type: none">• Increase emeriti engagement in the community• Increase recognition of emeriti contributions• Increase the ability of organizations to attract volunteers• Raise the program profile among emeriti	<ul style="list-style-type: none">• Draft budget and plan for database• Funding• Support from Pillar 4 group



PILLAR 2: Increase the community profile and involvement of the College and its members locally, provincially, nationally, and internationally

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
		<ul style="list-style-type: none">○ Data entry (if done manually, not as automatic entries from a survey form)○ Data use (universal access or vetted by an intermediary staff member?)				
3) Include more information on EC website about community involvement and expand the reach of UBC Emeritus College communications	<ul style="list-style-type: none">• New communications coordinator on staff to support UBC EC• Redesigned website	<ul style="list-style-type: none">• Hire communications coordinator• Develop plan and budget for website redesign• Hire consulting firm to redesign website• Go live with new website• Track and analyze website traffic data	<ul style="list-style-type: none">• 2023• 2024• 2024• 2024• 2025	Sandra van Ark Communica- tions Committee	<ul style="list-style-type: none">• Website plan implemented• Go-live of new website	<ul style="list-style-type: none">• Draft budget and plan for website• Funding• Support from Pillar 4 group

**PILLAR 3: Enhance recognition of the relevance and benefits of emeriti and the UBC Emeritus College to the University**

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
1) Establish a system for nominating emeriti at UBC for major external awards	<ul style="list-style-type: none">• More emeriti receive major awards	<ul style="list-style-type: none">• Establish a UBC EC Committee to guide the process• Hire a contract writer• Contact UBC Research to make the case for acknowledging importance of emeriti's work	2-3 years	Volunteers	<ul style="list-style-type: none">• Increased number of emeriti receiving awards	<ul style="list-style-type: none">• Volunteer committee• Unit reps support• Funding to hire a writer
2) Reinstate UBC President's involvement with UBC EC	<ul style="list-style-type: none">• UBC President values emeriti	<ul style="list-style-type: none">• Connect with new UBC President early in term• Book UBC EC presentation early in new year• Collaborate with President's office on joint events	Nov 2023 2024 1-2 years	Paul Harrison Executive UBC EC staff	<ul style="list-style-type: none">• Events demonstrate President's support:<ul style="list-style-type: none">○ Annual "State of UBC" address to UBC EC○ President hosts reception in person○ Online recognition	<ul style="list-style-type: none">• Succession planning
3) Gain recognition for professional activities undertaken by emeriti at UBC	<ul style="list-style-type: none">• Emeriti are recognized as "citizens of UBC" and valued for their contributions (past and on-going)	<ul style="list-style-type: none">• Identify opportunities to profile emeriti activities, awards, etc.• Post emeriti activities online to raise awareness:<ul style="list-style-type: none">○ Obtain data on emeriti scholarly and volunteer activities (potentially via personal outreach, faculty focus groups, emeriti survey)	Ongoing Ongoing Every 1-2 years	Communications Committee UBC EC staff Continuing Scholarly Activity and Engagement Committee (CSAEC)	Increased access to emeriti data	<ul style="list-style-type: none">• CSAEC to develop methodology (survey, focus groups, outreach)• UBC EC staff to implement and collate data• Funding for survey/engagement consultant• Use information from HR/Faculty Relations about retired faculty holding Post Retirement Appointments and survey these individuals as to

**PILLAR 3: Enhance recognition of the relevance and benefits of emeriti and the UBC Emeritus College to the University**

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
						their specific on-going activities and time commitment
4) Ensure emeriti are included in drop-down menus university-wide	<ul style="list-style-type: none">• Emeriti are automatically considered part of UBC• There will be clarification as to whether “emeriti” are faculty; several units mistakenly consider emeriti as faculty	<ul style="list-style-type: none">• Call for inclusion whenever emeriti are missing from a drop-down list• Establish a uniform policy across UBC administrative units for when “emeritus” will be on drop-down lists.	Ongoing		Emeriti attend UBC President’s breakfasts	
5) Establish the UBC EC Communications Committee	<ul style="list-style-type: none">• Central UBC communications includes UBC EC	<ul style="list-style-type: none">• Continue sending UBC EC news to academic units	1 year? Fall 2023			Volunteers
6) Provide opportunities for emeriti to meet socially	<ul style="list-style-type: none">• Influence reinstatement of faculty club• Determine (non-faculty-club)	<ul style="list-style-type: none">• Provide informal, drop-in social connections for emeriti• Use UBC EC and bookable space• Create display case for emeriti work	Ongoing	Gail Bellward Carolyn Gilbert Judy Hall Niamh Kelly		UBC EC staff

PILLAR 3: Enhance recognition of the relevance and benefits of emeriti and the UBC Emeritus College to the University						
Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
	alternatives for EC members to meet in-person, in addition to current Cycling and Wine Appreciation SIGs			Richard Spencer		

**PILLAR 4: Ensure the College is effective, efficient, and sustainable**

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
1) Implement the Communications Strategy		<ul style="list-style-type: none">• Hire communications coordinator• Identify communication priorities:<ul style="list-style-type: none">○ Set up working group to plan opening celebration for new UBC EC space○ Use opening as an opportunity to educate the university about UBC EC	Nov 30, 2024			
2) Enhance role of unit reps		<ul style="list-style-type: none">• Hold unit reps meeting• Clarify unit reps' role<ul style="list-style-type: none">○ Develop communications plan for unit reps○ Chair meeting: Membership Committee Chair David Hill○ Establish policy and procedures for unit rep appointments○ Reconfirm current unit reps	March 2, 2024 Nov 30, 2023 Before March 2	David Hill Linda Leonard Sarah Close Humayun Sandra van Ark		
3) Define UBC EC Roles	<ul style="list-style-type: none">• Well defined roles and responsibilities of UBC EC participants to provide clear direction on college strategic goals	<ul style="list-style-type: none">• Review existing Terms of Reference and job descriptions developed by Graeme Wynn to determine the need for revision/updates• Create template for expectations in job descriptions/Terms of Reference• Complete Membership & Benefits Committee	Within 2 years Ongoing updates	Joost Blom Sandra van Ark	<ul style="list-style-type: none">• Job descriptions for Membership, Benefits and Finance Committees	Staff (Sandra) Volunteer (Joost) Principal (Paul Harrison)



PILLAR 4: Ensure the College is effective, efficient, and sustainable

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
4) Set up systems to support volunteer leadership continuity	<ul style="list-style-type: none">• Successful leadership continuity• Response rate of new emeriti increases from 10% to 25%• Well defined process for direct, personal contact with individuals who indicate an interest in particular committees	<ul style="list-style-type: none">• Develop succession plans for leadership roles:<ul style="list-style-type: none">○ Create volunteer recruitment and replacement plans○ Create and maintain a three-year planning spreadsheet with names for committee chair and membership positions○ Maintain a spreadsheet detailing vacant committee positions that can be cross-referenced to responses of expressed interests by new members	2023/24 Ongoing	David Hill Queenie Law Paul Harrison Bill McCutcheon Joost Blom	<ul style="list-style-type: none">• New emeriti response rate of 25%• Three-year planning spreadsheet in use	

**PILLAR 4: Ensure the College is effective, efficient, and sustainable**

Objectives	Outcomes	Activities	Timeline	Accountabilities	Metrics	Resources
5) Obtain optimal human and financial resources (e.g., via UBC and fundraising)	<ul style="list-style-type: none">Sustainability of UBC EC	<ul style="list-style-type: none">Follow up with 14 new emeriti who returned interest form and seek committee participationRe-establish a Development Committee with Terms of ReferenceIncrease prominence of fundraising on website (e.g., specific projects or endowment)Identify and prioritize projects with strong fundraising appealRe-establish relationship with UBC Development (John Fleming)Develop the Business Plan that will be necessary to demonstrate the need for an increase in the annual EC budget to support the number of people and complement of skills necessary to support EC activities.	<p>Nov 30, 2024</p> <p>2-5 years:</p> <ul style="list-style-type: none">Establish committee in year oneBegin project in year two	Development Committee Communications Coordinator Council		<p>Executive, Council Communications Coordinator</p> <p>Admin Manager Executive Council Finance Committee</p>



APPENDIX 1: ACKNOWLEDGEMENTS

We would like to thank everyone who participated in the leadership planning session on September 21, 2023, for their contributions to creating an action plan:

Anne Junker	Executive – Past Principal
Bill McCutcheon	Executive – Vice-Principal
Carolyn Gilbert	Past President
David Hill	Council Member at Large (MAL)
Dianne Newell	Past Principal
Elizabeth Dean	SIG: Vegan Enthusiasts
Gail Bellward	CSAEC Committee Chair
Joost Blom	Past Principal
Judy Hall	Past President
Ken Craig	Past President
Linda Leonard	Transitions to Retirement Committee Chair
Mark Thompson	Past President
Nancy Gallini	Council MAL
Patricia Shaw	Council MAL
Paul Rogers	Council MAL
Paul Harrison	Executive – Principal
Paul Marantz	Past President
Paul Steinbok	Council MAL
Queenie Law	Office – Admin Assistant
Peter Dodek	at Paul H. and Nancy Gallini's request
Richard Spencer	Past President
Sandra Bressler	Cluster Program Convenor
Sandra van Ark	Office – Manager
Sarah Close Humayun	Office – Events and Communication
Steve Tredwell	Past Principal
<i>Consultants:</i>	
Patricia Evans	Facilitator
Lisa May	Report Writer