



THE UNIVERSITY OF BRITISH COLUMBIA

UBC Emeritus College

Priority Planning Retreat

September 11, 2024

2024-2025 Strategic Action Plan

Held on the unceded territory of the of the xwməθkwəy̓əm (Musqueam) Nation

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INTRODUCTION

“I’m passionate about enriching people’s lives in retirement.”

“This is a unique institution in the country, with enormous potential for interdisciplinary contributions to Canada and beyond.”

UBC EC Members

The [University of British Columbia Emeritus College](#) (UBC EC) supports faculty members, senior academic administrators, librarians, and other invited members as emeriti to:

- Transition into a fulfilling, successful retirement
- Continue contributing to academic work at UBC and the university’s reputation, through lecturing, mentoring, research and publishing, participating in university committees, and more
- Continue contributing to addressing important societal concerns

In fall 2022, the College executive, council members, committee chairs and staff developed a strategic plan with four priorities to guide activities in the following three years.

Then in fall 2023, UBC EC members held a day-long workshop to learn about progress made on these priorities in the previous year. Participants generated many ideas for the UBC EC Executive and Council, emeriti volunteers, and staff to implement. After a careful review, the team streamlined the work into eight goals, each supported by project plans, to support the four strategic priorities:

- 1) Implement the communications plan
- 2) Plan an opening celebration for new UBC EC space
- 3) Create a succession plan
- 4) Undertake development and fundraising
- 5) Determine ways to connect personally with members
- 6) Determine ways to reach non-tenure-track faculty
- 7) Generate lists and better tools for collecting data on UBC emeriti
- 8) Identify and update community volunteer opportunities

These eight goals are nested under the strategic priorities as shown in the table on the next page:



PRIORITY 1	PRIORITY 2	PRIORITY 3	PRIORITY 4
Enrich retirement for College members	Increase community profile locally, nationally and internationally	Enhance recognition of emeriti and College to the university	Ensure the College is effective, efficient, and sustainable
Goal 5: Determine ways to connect personally with members <i>(also priority 4)</i>	Goal 8: Identify and update community volunteer opportunities	Goal 7: Generate lists and better tools for collecting data on UBC emeriti <i>(also priority 4)</i>	Goal 1: Implement the communications plan
Goal 6: Determine ways to reach non-tenure track faculty			Goal 2: Plan an opening celebration for new UBC EC space <i>(also priorities 1, 2, and 3)</i>
			Goal 3: Create a succession plan
			Goal 4: Undertake development and fundraising

Purpose of 2024 Planning Retreat

This year, College members met on September 11, 2024, with the same intention to:

- Hear about the past year's accomplishments and work currently underway
- Share insights and ideas on ways to advance this work in the coming year, as the [2023-2025 UBC EC Strategic Plan](#) draws to a close
- Consider how best to spend member and staff time and resources in 2024-2025 to achieve this work

Progress Reports

At the 2024 priority planning retreat, project team members for each goal presented a progress report on completed activities and work planned and/or in progress toward achieving each goal in 2023-2024, in support of the UBC EC strategic priorities.

These presentations are summarized in **Appendix 1: 2023-2024 Accomplishments**, starting on page 23.

Action Plan for 2024-2025

This report documents the current context for UBC EC planning, identifies cross-priority themes emerging from the discussions, and sets out an action plan to successfully implement the College's strategic priorities in the final year of the current strategic plan.



CONTEXT FOR PLANNING

“The College reflects UBC values and scope, and is a fabulous, highly regarded organization.”

UBC EC Member

ENVIRONMENTAL SCAN

A STEEP—Social, Technological, Economic, Environmental, and Political—analysis provides a framework for assessing how external factors or trends affect an organization.

Workshop participants identified external factors in these areas that may impact the operating context of the UBC Emeritus College in the coming year.

STEEP External Factors

SOCIAL

- Members are concerned about a more dispersed emeriti community, as new retirees and retirees in general choose to move away from the Vancouver area and don't feel connected to UBC
- Many people are living longer lives and desire healthy aging, but may also face the challenge of emerging health issues, a reality that impacts involvement in the College as well
- In addition, retirement patterns are changing, with some people retiring younger, some older
- People are planning for their retirement finances, which may impact participation
- Retirees have many demands for their time from family, friends, and community—the Emeritus College is not their only option
- Changing public perceptions of the value of post-secondary research and learning
- A shortage of workers increases the value of older workers
- Societal interest in local stories is balanced against interest in international and political events
- Advocating for a faculty club would give emeriti a place to socialize and network

TECHNOLOGICAL

- Zoom enables greater participation by members wherever they're located, which increases numbers, but lessens in-person engagement:
 - Technological changes offer the opportunity for more remote inclusion of emeriti
 - Technology should not totally replace face-to-face interactions, but some members are reluctant to meet in person after the impacts of the COVID pandemic
 - Can UBC EC use social media more effectively to bring people together?



- Opportunities to leverage technology in positive ways include using platforms and virtual meetings to better engage people
- AI use is growing, with both potential for benefits and risk, with hacking, scamming, and image manipulation

ECONOMIC

- High cost of living in Metro Vancouver and inflation
- Limitations on international student fees will increase pressure on publicly institutions, with the potential to reduce university funding and impact College support
- UBC EC needs strong fundraising strategies to convince donors to give to the College:
 - Opportunities exist to tap into the wealth of baby boomers and UBC EC members as donors
 - Planning skill sets needed for fundraising and finding other funding sources

ENVIRONMENTAL

- Decline in tree cover, increase in temperatures/heat domes, food insecurity, a lack of water:
 - Lead to a decline in the ability of older people to engage
 - Some retirees are moving further away because of climate changes
- UBC Emeritus College could lead the university to sustainability:
 - Involve emeriti in environmental activities
 - Use opportunities to engage in interdisciplinary programs and raise awareness

POLITICAL

- UBC EC has a major opportunity to reach funding sustainability through the new UBC president and needs to ensure all activities are reported on to educate him on the added value of the College
- A change in provincial and/or federal governments following upcoming elections could change funding priorities:
 - The provincial deficit has potential to be harmful for the university budget
 - Right wing governments could impact spending toward an anti-education stance
 - We are living in an unstable political environment that may threaten academic freedom
 - Government policy toward higher education may impact what UBC EC can offer members
 - Global priorities are directing funds toward defense spending



“We need to find ways to respect and value our elders like Indigenous cultures do.”

UBC EC Member

Strengths & Weaknesses

Workshop participants also considered internal strengths and weaknesses to be aware of and leverage, when possible, identifying some of the College’s:

- Greatest assets members can rely and build upon
- Areas with room for improvement to make the College more effective

ASSETS TO BUILD UPON

- Enthusiastic people—members and staff—who give the College a committed core:
 - Strong core staff members who are quick to respond and cater to a wide range of needs and interests
 - A good range of members willing to volunteer
- Resources for transitioning to a fulfilling retirement (including excellent health and travel insurance benefits):
 - Networking opportunities to meet like-minded people
 - Volunteering opportunities to learn and share ideas and improve support for quality of life
 - Interdisciplinary approach brings strength in life experience, skill sets and brain power

OPPORTUNITIES FOR IMPROVEMENT

- UBC Emeritus College faces a gap in funding to adequately support activities:
 - UBC EC has so much to do and not enough resources
 - Messaging to engage potential donors is needed as soon as possible
 - Need to encourage faculty to contribute to UBC after retirement
- Reach and engage more members in UBC EC to find meaning and create value in retirement:
 - Many Okanagan emeriti have the perception they’re not recognized as full UBC EC members
 - Find ways to reach emeriti without UBC email addresses
 - Members may not recognize and value the work of the College
 - Engage more young retirees in retirement planning and imagining the type of college that would attract them in 10 years
- UBC EC needs to gain recognition as a valuable academic resource
- UBC EC could be more active in the [College and University Retiree Associations of Canada](#) (CURAC), [Association of Retirement Organizations in Higher Education](#) (AROHE), and [European Association of Professors Emeriti](#) (EAPE)



CROSS PRIORITY THEMES

“The UBC Emeritus College should be an integral part of the university, on the continuum from student to emeritus.”

UBC EC Member

Retreat participants broke into discussion groups to:

- Consider work underway or completed toward achieving the 2023-2025 strategic plan priorities
- Identify ways to achieve planned activities in the coming year and build on accomplishments to date
- Identify who will lead and support activities and how to better engage members

Common cross-priority themes emerged during the discussions—which reflect the internal and external factors identified in the environmental scan—and are foundational to sustaining the organization long-term:

INCREASE FUNDING

Finding sources of additional funding is essential to the UBC Emeritus College’s sustainability. The accumulated surplus of \$235,000 has been fully committed and will be spent by the end of 2025.

Going forward, existing university support will not be sufficient to sustain the organization, which is also a reflection of the College’s growing success and expanded scope. An increase of approximately \$200,000 in the operations budget is needed, or the College will be forced to return to an earlier mode of operating. Consequently, developing a fundraising case and strategy has become a priority for College activities.

UBC EC members noted the importance of continuity across the College’s leadership, as efforts will exceed the duration of executive terms, as well as support from the Finance Committee.

STRENGTHEN SUSTAINABILITY

In addition to a focus on funding, sustainability involves reaching new members, increasing engagement, and creating a succession “pipeline” for positions across committees and programs. (Succession planning usually refers to senior leadership and the College already has a plan for leadership continuity with its Past Principal, Principal and Vice Principal positions.)

Unit reps of the 75 university departments, schools and faculties are seen as the most important vehicle for making personal connections and sharing information on UBC EC benefits and activities with potential new College members.



ENHANCE COMMUNICATIONS

Communications is seen as an integral part of all the College does to amplify awareness, promote recognition, and enhance participation. UBC EC leaders and members share an appetite for strengthening communications to help change perceptions and increase support for the organization.

Sharing the UBC EC value proposition across audiences is crucial and designed to move the dial in all these areas. Work is in progress.

IMPROVE DATA COLLECTION

Increasing data collection, analysis and dissemination is foundational to quantify and qualify UBC EC contributions, success stories, and benefits (to retirees, communities, UBC and society). Using an evidence-informed approach whenever possible builds the case for expanding College recognition, participation and support.

While UBC has no centralized data collection system or standards, College members have identified various vehicles for improving data collection, including a new committee to work in this area.

EXTEND REACH TO UBCO AND MEMBERS BEYOND THE LOWER MAINLAND

Emeriti from UBC Okanagan (UBCO) and outside the Lower Mainland attended the planning session and noted the challenge of participating in the scope of UBC EC activities. About 5% of UBC EC membership lives in the Okanagan; many have the perception they are not recognized as full Emeritus College members. Others are moving away from Metro Vancouver when they retire.

These members would like UBC EC to explore ways of connecting with people living in outlying areas, including more Zoom/hybrid meetings, so all can participate, noting the College's "unfulfilled potential to enrich the lives of Okanagan emeriti."

DEVELOP A MORE INCLUSIVE SCOPE OF VOLUNTEERISM

The Community Volunteer Group name and recent survey scope tend to focus attention on participation in community-based groups. However, UBC EC members also participate in a range of volunteer activities that fall outside that scope—from expert presentations to committee membership, research, teaching, graduate supervision, media interviews, and more.

Emeriti would like to see a more inclusive definition of volunteerism for the College to incorporate the full range of activities members engage in, all of which help burnish the reputation of UBC and can result in cost savings for the university.



NEXT STEPS

“We have wonderful learning experiences with wonderful people. I hope we continue to grow and add value to the university.”

UBC EC Member

The action plan for 2024-2025, starting on the next page, reflects the cross-priority themes and:

- Identifies goals and activities for the coming year to move UBC EC towards achieving the priorities in the strategic plan
- Lists the outcomes expected from implementing the goals and activities
- Identifies individuals and groups responsible for implementation
- Provides space to define metrics to measure progress and achievement of the goals



2024-2025 ACTION PLAN

PILLAR 1: Enrich Retirement for College Members

- Goal 5 – Determine ways to connect personally with members
- Goal 6 – Determine ways to reach non-tenure track faculty

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
1) Create awareness of the UBC Emeritus College	<ul style="list-style-type: none"> • Growing awareness of and appreciation for UBC EC among retirees 	<ul style="list-style-type: none"> • Have unit reps email department heads about emeriti • Recruit unit reps at UBCO • Promote UBC Emeritus College in the Benefits/Retirement Seminar 	2024-2025	<ul style="list-style-type: none"> • Unit reps (principal vehicle to provide awareness of UBC EC benefits and activities) • Membership Committee • Paul Marantz and Linda Leonard 	To be added
2) Build College membership	<ul style="list-style-type: none"> • UBC EC reaches out to more members eligible for election to College • More members who are eligible to join apply to UBC EC • New emeriti become engaged in UBC Emeritus College activities sooner 	<ul style="list-style-type: none"> • Connect with those nearing retirement about UBC EC in general Human Resources (HR) and Faculty Relations communications: <ul style="list-style-type: none"> - Inform retirees not confirmed by the senate of their eligibility to apply to the College • Enhance the role of and continue to recruit a full crew of unit reps: 	2024-2026	<ul style="list-style-type: none"> • Unit reps • Membership Committee • HR and Faculty Relations • Vijay Verma (TRIUMF retirees) 	Connect with 50-60 new emeriti every year



		<ul style="list-style-type: none">- Task unit reps with strategic communications and bring retirees into more engaged connection with the College (e.g., on retirement activities, benefits)- Consider a unit rep term to build in a succession pipeline- Use unit reps to connect with retirees within departments not granted emeriti status by the senate- Expand unit reps at UBCO• Add a line in the welcome letter to people reaching retirement to update the UBC EC office with an alternative email to maintain connections• Send a special invitation email to new emeriti and elected members• Welcome new members with a PowerPoint listing			
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		<p>all their names at their first general meeting:</p> <ul style="list-style-type: none">- Hold a hybrid meeting- Book room for UBCO emeriti to meet and socialize• Broaden the UBC EC membership base beyond constituent groups:<ul style="list-style-type: none">- Contact potential TRIUMF emeritus retirees- Access large numbers of clinical faculty in medicine and health sciences, including hospital-based professionals• Expand UBCO membership in the Age-Friendly University Global Network to the rest of UBC (longer term goal)			
3) Ensure enriching programs and benefits are available	<ul style="list-style-type: none">• Largely in place now	<ul style="list-style-type: none">• Continue current activities in this area• Use website and newsletter to promote communications	Ongoing	<ul style="list-style-type: none">• General College operations/ staff• All committees, programs, etc.	TBA

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

- Goal 8 – Identify and update community volunteer opportunities**

2024/25 Goal	Outcomes	Activities	Timeline	Accountabilities	Metrics
1) Identify and update community volunteer opportunities	<ul style="list-style-type: none"> • Increase in number of UBC EC members volunteering • UBC EC members recognized for representing UBC • Increasing awareness of College contributions to UBC's reputation 	<ul style="list-style-type: none"> • Put list of volunteer organizations from survey on UBC EC website and in newsletter: <ul style="list-style-type: none"> - Share with CURAC, AROHE, EAPE to maintain connections and broaden reach • Post emeriti volunteer activities in UBC EC's digital spaces (website, social media, etc.): <ul style="list-style-type: none"> - Sign up to post stories online via UBC Media Relations link for the Emeritus College as well - Document College member activities with the media • Clarify how the College defines volunteering: <ul style="list-style-type: none"> - Within UBC and outside UBC (e.g., giving a talk, writing a paper, attending an event) - Include teaching as well as community activities - Educate faculties, departments and schools on what volunteering includes 	2024-25 Ongoing 2024	<ul style="list-style-type: none"> • Ruth Derksen and Nancy Gallini/survey team members • Office staff (Consider the resource/financial implications (e.g., staff time/cost of awards)) • Unit reps 	TBA



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

- **Goal 8 – Identify and update community volunteer opportunities**

2024/25 Goal	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<ul style="list-style-type: none">• Provide recognition for emeriti volunteering (as an unpaid service to the community and university)• Obtain reports from department heads on the number of emeriti volunteering to teach• Be aware of political issues with emeriti volunteering in internal UBC activities• Give awards a higher profile every year:<ul style="list-style-type: none">- Put award deadlines in newsletter- Refer to prize winners for community service activities in the President's Award• Provide opportunities for College members to volunteer in activities to address major societal issues (e.g., truth and reconciliation, climate change)• Share volunteering metrics with the Vice Provost, President and Provost to promote knowledge of College contributions to UBC• Scan UBC daily media listing for UBC EC representation to pull data/set metrics			



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

- Goal 8 – Identify and update community volunteer opportunities**

2024/25 Goal	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<ul style="list-style-type: none">• Include short vignettes on what UBC EC volunteers are doing in person and online to illustrate experiences others can tap into• Revive list of jobs retirees did at UBC without compensation			

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

- Goal 7 – Generate lists and better tools for collecting data on UBC Emeriti**

2024/25 Goal	Outcomes	Activities	Timeline	Accountabilities	Metrics
1) Generate lists and better tools for collecting data on UBC Emeriti	<ul style="list-style-type: none"> Increased knowledge of College contributions to enhancing UBC's reputation Increased awareness of UBC EC cost saving benefits to the university (e.g., with teaching and supervision, emeriti fundraising contributions) Increased awareness of UBC EC Scholarship Committee contributions to solving societal problems 	<ul style="list-style-type: none"> Establish UBC EC Data Collection Committee: <ul style="list-style-type: none"> Recruit committee members Identify five to ten areas of UBC EC activities and contributions for data collection in the first year, such as: <ul style="list-style-type: none"> Fundraising data – Obtain from UBC Development office Research and scholarship data – Obtain from PI grants and contracts, Planning and Institutional Research Office (PAIR) with UBC ranking Teaching data – Obtain from Graduate/Post Doc studies for those serving as supervisors and on committees (hours/type of teaching available?) Enhancing UBC's reputation data – Obtain from Media Relations registry of/invited expert speakers; Pull data on major awards UBC service data – Need to pull data as no repository on senate, UBC committee involvement 	2024 and ongoing	<ul style="list-style-type: none"> Anne Junker to lead new committee Unit reps for information on awards from professional associations Saundra van Ark 	TBA



		<ul style="list-style-type: none">- Community service data – Need to pull data- Active faculty versus emeriti data – 20% of UBC academics are emeriti- Define major awards and whose job it is to pull the information (e.g., Order of Canada and of BC are available online but others may be more difficult)- Define UBC service and who/how to mine service areas- Obtain information on any external unit reviews of units available and what, if any, attention is paid to emeriti achievements- Obtain information on honours achieved by individual unit members, fellowships, and memberships on international and national scholarly committees• Share data collected with UBC• Identify ways to encourage emeriti to self report• Evaluate progress and establish success criteria to measure reach• Develop a list of “snappy UBC EC facts” for easy promotional use, such as:<ul style="list-style-type: none">- 20% of UBC academics are emeriti			
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		<ul style="list-style-type: none">- Over 100 emeriti listed as expert speakers with UBC Media Relations• Develop a catalogue of stories to showcase success in retirement and ongoing contributions enhancing UBC's reputation to profile in the newsletter and website (e.g., people who continue with research programs, presentations, community service, etc.)			
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**PILLAR 4: Ensure the College is effective, efficient, and sustainable**

Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
1) Implement the Communications Plan	<ul style="list-style-type: none"> Increased awareness of UBC EC's offerings among audiences Increased member activity attending College events and volunteering Improved relationships with members through outreach activities 	<ul style="list-style-type: none"> Finalize the UBC EC Communications Road Map Implement priority projects (some are already underway): <ul style="list-style-type: none"> Create a one-pager on the College Create procedures, processes and reports for communications (e.g., templates with branding, timing for campaigns, elements necessary to deliver communications) Refresh the website content to clarify the: <ul style="list-style-type: none"> College's value proposition Benefits of membership Purpose of each webpage Strengthen UBC EC's social media presence: <ul style="list-style-type: none"> Communicate how UBC EC delivers on strategic priorities with a content calendar with themes Increase participation with members (with an emphasis on non-tenured and medical members who may not be aware of the College) 	2024 2024-2025	<ul style="list-style-type: none"> Lynn Warburton Sarah Close Humayun Queenie Law Saundra van Ark Event Planning Committee Development/Fundraising Committee 	TBA

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

Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<ul style="list-style-type: none"> - Create a communications plan for the UBC EC opening celebration - Create a communications plan for the Development/Fundraising Committee 			
2) Plan an opening celebration for new UBC EC space	<ul style="list-style-type: none"> • Increased awareness of College among UBC leadership • Increased awareness of College among new retirees • Increased participation in UBC EC among eligible retirees 	<ul style="list-style-type: none"> • Determine event timing (must align with the president's schedule) • Implement the communications plan for the opening celebration: <ul style="list-style-type: none"> - Expand event planning committee - Ensure communications across UBC/UBCO • Develop program elements appealing to emeriti/members in the ceremony: <ul style="list-style-type: none"> - Organize event to celebrate UBC EC and enhance visibility in university (e.g., use lobby space, not just a small gathering in the office) - Consider holding a full day conference in partnership with the Centre for Healthy Aging to enhance UBC EC's profile - Include a musical reception in the lobby 	2024 2024-2025	<ul style="list-style-type: none"> • Sarah Close Humayun • Lynn Warburton • Event Planning Committee • Queenie Law • Sandra van Ark • Computer science and statistics for data 	TBA

**PILLAR 4: Ensure the College is effective, efficient, and sustainable****Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising**

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<ul style="list-style-type: none">- Promote positive messaging/announcement of future AGM- Showcase UBC EC data- Plan a panel discussion with engaging speakers related to the event (invite Steve Patterson from CBC The Debaters to lead/moderate humorous discussion about aging process/debunk myths)- Tie in fundraising and donations (e.g., consider a donor wall, UBC EC donor naming designation)• Invite audiences:<ul style="list-style-type: none">- UBC President- Provost/Vice Provost- Deans who support UBC EC into the future- Unit Heads- Emeriti about to retire (via Faculty Relations)- Students (find ways to connect with/include students in the program, e.g., UBC EC support for student activities)			

**PILLAR 4: Ensure the College is effective, efficient, and sustainable****Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising**

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
3) Create a succession pipeline	<ul style="list-style-type: none">	<ul style="list-style-type: none">Reach out personally to members who retired two to three years ago with the survey:<ul style="list-style-type: none">Create lists of emeriti who retired two to three years agoBuild a pool of active involved emeriti:<ul style="list-style-type: none">Identify new membersPackage volunteer opportunities with smaller tasks to offer “volunteer light, medium and heavy” participationInvite members to meetings with no obligation, just to see how it works and if interestedKeep communicating with members to encourage engagementObtain list of emeriti about to retire to contactTalk to current faculty as people transition to retirementUpdate job descriptions with committee purpose, terms of office, and time expectations to clarify roles:	2024 and ongoing	<ul style="list-style-type: none">Committee chairs to break down tasksCommittee chairs to invite members to meetingsUnit reps to assist with list of emeriti about to retireUBC EC Executive and Council to consider renaming program groupMembership Committee to update job descriptionsLynn Warburton	TBA

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

Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<ul style="list-style-type: none"> - Test with one or two committees to assess how it works in the coming year - Consider staffing committees on staggered terms (e.g., vice chair this year, chair next year) • Consider renaming the program group a committee to provide structure that supports succession planning • Invite new retirees to a gathering where UBC EC can make a pitch (e.g., president's reception for incoming emeriti) • Post help wanted page on website to attract new recruits • Develop a communication strategy to increase College recruitment 			
4) Undertake development and fundraising	<ul style="list-style-type: none"> • Increase in funding to sustain UBC EC • Growing donor base 	<ul style="list-style-type: none"> • Confirm fundraising goal amount with the College executive and Finance Committee (\$100-150,000) • Establish three priority strategies to achieve fundraising goal of \$100,000: <ul style="list-style-type: none"> - Primary focus – Annual giving plan (e.g., tied to UBC Annual Giving Day or monthly contribution tied to 	2024 End of 2025 Annually	<ul style="list-style-type: none"> • UBC EC Executive and Council and leadership continued commitment to support • Development/Fundraising Committee • Finance Committee 	\$100,000 in new UBC EC funding

**PILLAR 4: Ensure the College is effective, efficient, and sustainable****Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising**

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<p>College membership; consider offering matching funds)</p> <ul style="list-style-type: none">- Planned giving (longer term)- Estate giving (longer term)• Develop value proposition:<ul style="list-style-type: none">- Primary message – Focus on donor contributing to the value of the organization, not operating costs- Highlight that UBC EC doesn't charge dues• Develop list of items for donors to contribute to (share with UBC Development Office), such as:<ul style="list-style-type: none">- Fund an academically focused professorship- Fund an interdisciplinary/intergenerational conference- Develop ideas for larger donors' estate planning, such as a scholar fund- Develop a research theme- Create five donor cases- Fund a naming opportunity for the new UBC EC space			

**PILLAR 4: Ensure the College is effective, efficient, and sustainable****Goal 1 – Implement communication plan | Goal 2 – Plan an opening celebration for new UBC EC space | Goal 3 – Create a succession plan | Goal 4 – Undertake development/fundraising**

2024/25 Goals	Outcomes	Activities	Timeline	Accountabilities	Metrics
		<ul style="list-style-type: none">• Create a donor wall to motivate and provide recognition• Invite John Fleming, UBC Director of Development, Gift & Estate Planning, to sit on the UBC EC Development/Fundraising Committee:<ul style="list-style-type: none">- Collaborate on developing UBC EC annual giving, planned giving, estate planning and endowed funding campaigns• Co-organize/co-fund with partners to stimulate interdisciplinary discussions all can build on• Align resources with College priorities• Consider the pros and cons of free membership			



APPENDIX 1: 2023-2024 ACCOMPLISHMENTS

Each project team presented a review of completed activities and work planned and/or in progress in the previous year for each goal, in support of the UBC EC strategic priorities. The slides below summarize these activities, showing the status of each planned action by colour:

- Green = on track
- Yellow = potential challenges advancing the action
- Red = action halted or cancelled

STRATEGIC PRIORITY 1

David Hill, Chair of the UBC EC Membership Committee, provided a progress review of efforts toward achieving Goal 5 in 2023-2024, in support of Strategic Priority 1:



Strategic Priority 1: Enrich retirement for College members

Goal 5: Determine ways to connect personally with members

Achieved	Planned	Status		
Annual meeting of unit reps reactivated	Annual meeting March 2025	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New unit reps recruited	Unit reps' document revised	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Appeal to department heads	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow-up on recommendations/referrals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Barriers: vacant unit rep positions, capturing new emeriti, engagement

In addition, David provided an update on the work underway toward achieving Goal 6 in 2023-2024, also in support of Strategic Priority 1 (shown on the next page):



Strategic Priority 1: Enrich retirement for College members

Goal 6: Determine ways to reach non-tenure track faculty

Achieved	Planned	Status		
Annual meeting of unit reps reactivated	Annual meeting March 2025	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
New unit reps recruited	Unit reps' document revised	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Appeal to department heads	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Follow-up on recommendations/referrals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Listing of job titles	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Determine communication tools	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Unit rep provided with names of retirees/potential EC members	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Barriers: volume of information; making direct contact

STRATEGIC PRIORITY 2

Ruth Derkson, Co-convenor of the Community Volunteer SIG, presented a progress report toward achieving Goal 8 in the previous year, in support of Strategic Priority 2:



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

Goal 8: Identify and update community volunteer opportunities

Achieved	Planned	Status		
Designed survey re volunteers	Evaluate surveys; document data in useable form; list (on website)	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transfer of Convener status	volunteer organizations; list	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Communicated w/ listserv re volunteers	potential organizations for future engagement; raise awareness	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Called first meeting for Sep. 17 at new location	among emeriti and overall UBC governance. Late submission of completed surveys; postponed deadline for completion; delayed evaluation.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Barriers: Distribution of surveys required extension, resulting in delayed documentation/assessment and distribution of results



STRATEGIC PRIORITY 3

UBC EC Administrative Manager Sandra van Ark shared an update on the work underway toward achieving Goal 7 in 2023-2024, in support of Strategic Priority 3:



Strategic Priority 3: Enhance recognition of the relevance and benefits of emeriti and the UBC Emeritus College to the University

Goal 7: Generate lists and better tools for collecting data on UBC Emeriti

Achieved	Planned	Status
	Decide on committee. Comms committee w/ Comms Mgr support	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
	Determine emeriti activities/details	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
	Determine communication tools to collect data	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>



Barriers: Distribution of surveys required extension, resulting in delayed documentation/assessment and distribution of results

STRATEGIC PRIORITY 4

Lynn Warburton, UBC EC Communications Manager, presented a progress report on activities toward achieving Goal 1 in the previous year, in support of Strategic Priority 4:



Strategic Priority 4: Ensure the College is effective, efficient, and sustainable

Goal 1: Implement Communication Plan

Achieved	Planned	Status
Established Communications Committee		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Hired Communications Manager		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
Created Draft Road Map with Communications Consultant		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Finalize Road Map, which will include priorities	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



Barriers: Priorities will need to be made as there are too many action items for one year



Bill McCutcheon, UBC EC Principal, provided an update on completed activities and work planned and/or in progress toward achieving Goal 2 in 2023-2024, in support of Strategic Priority 4:



Strategic Priority 4: Ensure the College is effective, efficient, and sustainable

Goal 2: Opening celebration for new UBC EC space

Achieved	Planned	Status		
March 1/24 – tour of new space still under construction	Official opening ceremony of new EC space; celebration planned	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
August 8/24 – EC staff moved into new offices				



Barriers: Principal will need 2–3 volunteers to create a program for this event

Joost Blom, Co-chair of the Benefits Committee, shared an update on the work involved in Goal 3 in 2023-2024, in support of Strategic Priority 4:



Strategic Priority 4: Ensure the College is effective, efficient, and sustainable

Goal 3: Create Succession Plan

Achieved	Planned	Status		
First orientation meeting for incoming Council members	Recruit small project committee, ideally with recruiting experience	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EC Office maintaining list of potential recruits	Continue orientation sessions as regular practice	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Expand efforts to build list of potential recruits	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Develop template for describing member responsibilities and time commitments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Develop process for encouraging multi-year terms	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Barriers: Need steady stream of members; persuading them to volunteer is time-intensive



Lastly, Bob Armstrong, UBC EC Council Member, presented a progress report of the work toward achieving Goal 8 in the previous year, in support of Strategic Priority 4:



Strategic Priority 4: Ensure the College is effective, efficient, and sustainable

Goal 4: Development/Fundraising

Achieved	Planned	Status
Re-establish Development Committee with ToR		<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Increase prominence of fundraising on website	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
	Identify & prioritize projects with strong fundraising appeal	<input type="checkbox"/> <input type="checkbox"/> <input checked="" type="checkbox"/>
	Re-establish relationship with UBC Development (John Fleming)	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>



Barriers: First step was to update ToR and appoint committee; this is now in place and committee is meeting



APPENDIX 2: ACKNOWLEDGEMENTS

We would like to thank everyone who participated in the priority planning session on September 11, 2024, for their contributions to creating a new action plan for the UBC Emeritus College in 2024-2025:

Bob Armstrong, UBC EC Council Member
Joost Blom, Co-chair, UBC EC Benefits Committee
Sandra Bressler, UBC EC Executive, Vice Principal
Deborah Buszard, UBC Okanagan
Sarah Close Humayun, UBC EC Events and Engagement Coordinator
Kenneth Craig, Past President
Ruth Derksen, UBC EC Council Member
Donald Fisher, Past Principal and EC/Green College Program Convenor
Carolyn Gilbert, Convenor, UBC EC Special and Ad Hoc Lectures
Wendy Hall, UBC EC Council Member
Judy Hall, Past President
Paul Harrison, UBC EC Executive (Past Principal)
David Hill, UBC EC Council Member
Melanie Jones, UBC Okanagan
Anne Junker, Chair, UBC EC Communications Committee
Queenie Law, UBC EC Administrative Assistant
Linda Leonard, Chair, UBC EC Transitions to Retirement Committee
Paul Marantz, Coordinator, UBC EC Retirement Matters Cluster
William McCutcheon, UBC EC Executive, Principal
Dianne Newell, Past Principal
Philip Resnick, SIG Poetry Convenor
Roy Saunders, SIG Photo Convenor
Richard Spencer, UBC Senate Rep, Academic Policy
Paul Steinbok, UBC EC Council Member
Mark Thompson, Past President
Stephen Tredwell, Past Principal
Sandra van Ark, UBC EC Administrative Manager
Vijay Verma, UBC EC Council Member
Lynn Warburton, UBC EC Communications Manager
Valerie White, UBC EC Newsletter Editor
Sandra Wilkins, UBC EC Council Member