



THE UNIVERSITY OF BRITISH COLUMBIA

# UBC Emeritus College Strategic Plan 2023 through 2025



## About the UBC Emeritus College

In 2018, the University of British Columbia Senate and Board of Governors approved the Emeritus College as an academic unit of the University, a status still unique in Canada. All retired UBC employees who hold emeritus status granted by the UBC Vancouver or Okanagan Senate automatically become members of the College; other faculty and senior administrators can apply for membership. The College is the successor organization to and builds upon the past achievements of the UBC Association of Professors Emeriti in creating a community of scholarship and camaraderie for retired UBC faculty, librarians, and administrators while also providing support for their continued intellectual growth, scholarly output, involvement in both university-based and community-support activity,<sup>1</sup> and development of personal interests. The College Principal reports to the Provost/Vice President Academic through the Vice-Provost and Associate Vice-President, Academic Affairs. The Senate-approved Terms of Reference for the College define its Vision and Objectives to:

- (1) enrich intellectual focus and continued intellectual involvement for all retired UBC employees who hold emeritus status (“Emeriti”) granted by the UBC Vancouver Senate or the UBC Okanagan Senate;
- (2) promote active participation of Emeriti within the function of UBC; and
- (3) add to UBC’s profile, status, and involvement within the local, national, and international communities.

These Terms of Reference further define the roles and responsibilities for the College, its Members, Principals, Council and Committees, including processes for nominations and elections, financial records, college records, and meetings. Amendments to these Terms are possible but must be approved by the UBC Vancouver Senate and Board of Governors.

On the [College website](#) you will find further information about the people and committees that contribute to its work, as well as activities including informative and intellectually engaging programs planned to be of interest to all College members as well as special interest groups (SIGs) engaging smaller groups of people. Other [online resources](#) include information about the College’s history, and several publications and reports.

This strategic plan was developed collaboratively in late 2022 under the leadership of the College Principal and Council, along with staff and committee chairs.

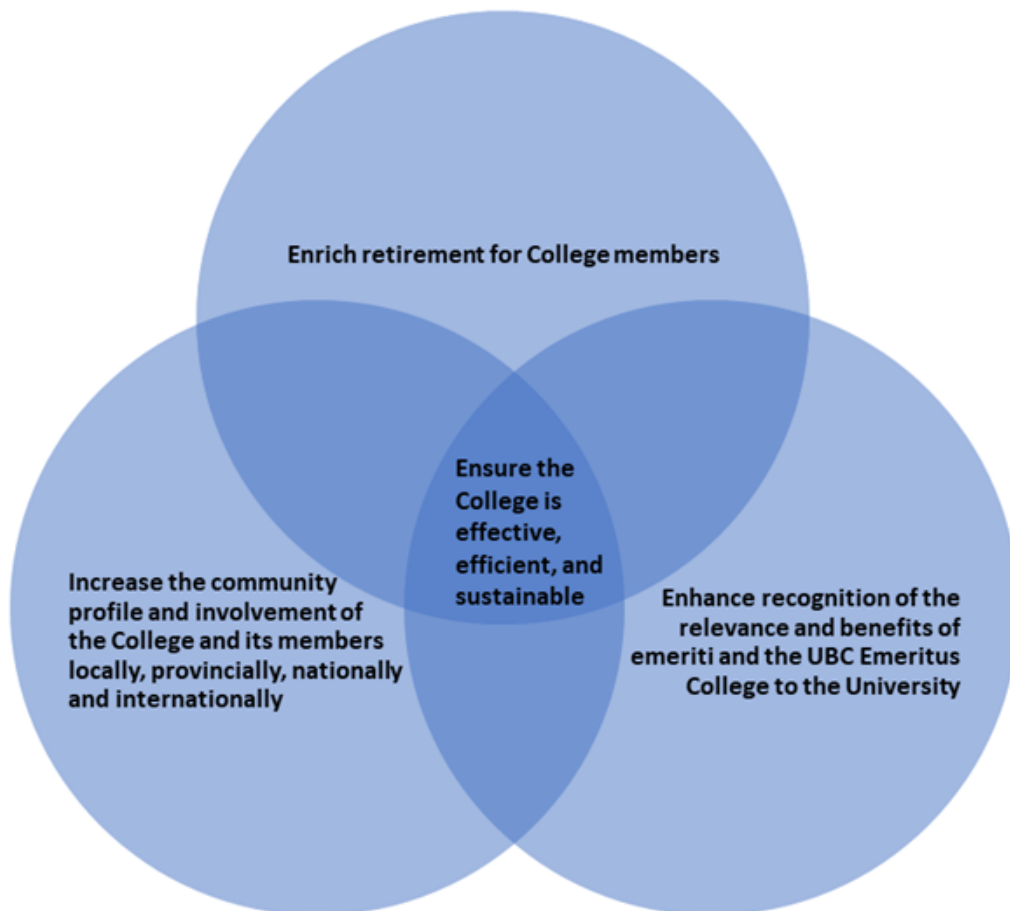
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<sup>1</sup> Aim 1, excerpt from Donald Fisher (Vice-Principal), “Establishment of the UBC Emeritus College,” UBC Emeritus College Newsletter, 1/2 November 2018.



## The Strategic Plan

The image below summarizes the 2023-2025 Strategic Plan for the UBC Emeritus College, which comprises four priority areas. All four will be pursued simultaneously, and while at any given time activity in one or another of the priority areas may be the “top of mind” focus for the College, the integrated set of priorities will continue to guide College activities for the next three years.





## STRATEGIC PRIORITY: Enrich retirement for College members

The College advocates for benefits, recognition, and programs that promote the well-being of its members and provides a community supporting the continued connection of retired UBC faculty, librarians, and administrators with each other, the University, and the community.<sup>2</sup> It also has a major role in working with UBC Human Resources to assist with successful transitions of faculty into retirement.

This generation is redefining retirement both in terms of how one evolves away from their academic career and creates their subsequent life course over the next 20 or 30 years. The importance of healthy aging is highlighted by the United Nations designation of 2021-2030 as the Decade of Healthy Aging. Aspects of healthy aging include being socially connected, mentally stimulated and active. The College is in an ideal position to foster healthy aging of its members by promoting social and intellectual interaction and collaboration among retired colleagues from a wide variety of university disciplines. It provides programming and opportunities for the exchange of ideas and fosters an environment that supports interdisciplinary inquiry.<sup>3</sup> The College enhances the potential for emeriti to maintain their connection with the University, to nurture existing relationships and develop new ones with colleagues in other disciplines. It also supports activity groups that enable individuals to be engaged with others in special personal or community interests

### Objectives & Activities

The following objectives and related activities will be pursued as part of this priority:

- 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.
- Benefits and privileges awarded to retired faculty by UBC and negotiated by the College with other insurance agencies for its members are enhanced and maintained.
- Provide programs aimed to inform and stimulate members to engage with each other beyond disciplinary boundaries.
- Provide opportunities for social interactions amongst members.

### Outcomes

Pursuit of this priority and its related objectives will deliver benefits and outcomes such as:

- An annual welcome event/information is held for new members.
- Links to information about the College and Retirement Planning workshops on the College website are on a multitude of websites including Faculty Relations, HR, Faculty Pension Plan, and the Provost's office.

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<sup>2</sup> Aim 2, excerpt from Donald Fisher (Vice-Principal), "Establishment of the UBC Emeritus College," UBC Emeritus College Newsletter, 1/2 November 2018.

<sup>3</sup> Aim 3, excerpt from Donald Fisher (Vice-Principal), "Establishment of the UBC Emeritus College," UBC Emeritus College Newsletter, 1/2 November 2018.



- Deans, Department Heads and Directors are aware of the College and information available on retirement and procedures leading up to it.
- With HR, other relevant groups are identified (clinical, sessional, Triumf) to receive information and establish links to resources available on the College's website.
- Retirement Planning workshops continue to be co-sponsored with Faculty Relations.
- There is continued coordination and cooperation with the Faculty Pension Plan (FPP), including participation in the annual FPP forum.
- Information and resources to support faculty members and others considering retirement continues to be revised, updated, and augmented.
- The feasibility of an information session on health insurance options for retirees is explored.
- There is continued work with UBC administration and insurance companies re: maintenance, enhancement, and delivery of benefits.
- The new Emeritus College campus premises are used as a social hub for local College members.
- Members report their activities during retirement are improved because of the College and its programs.
- Members report the College and its programs improves their satisfaction with retirement.



## **STRATEGIC PRIORITY: Increase the community profile and involvement of the College and its members locally, provincially, nationally, and internationally**

The College encourages social and civic engagement by its members within the UBC community, Indigenous communities and the external community at large.<sup>4</sup> With a wealth of academic background and professional connections, College members are uniquely qualified to engage with community groups at all levels. They bring their wisdom, skills, and experience to community and business organizations, and sit on scientific, professional, and government committees. Many College members already make significant and important contributions at all community levels, but these contributions are not widely known, despite the many major recognition awards they have received. This priority will contribute to UBC's reputation and support College members to engage with the community at all levels. In the process this will enhance opportunities to identify additional fulfilling voluntary roles for its members and contribute to the diminishing of ageism.

### **Objectives & Activities**

Objectives and related activities to be pursued as part of this priority include:

- Increase, and support, contributions by College members in addressing major societal issues (e.g., truth and reconciliation, climate change, poverty, discrimination, educational inequality etc.)
- Identify and promote opportunities for emeriti to participate in communities locally, nationally, and internationally.
- Increase the reach and quality of external communications about the College, and its members, to communities at all levels.
- Increase collaboration with emeriti groups throughout Canada, particularly those similarly engaged in community outreach and societal issues.

### **Outcomes**

Pursuit of these objectives will result in measurable benefits and outcomes such as the following:

- Increasing awareness of, and participation in, initiatives addressing major societal issues by College members linked with a corresponding external awareness of the College's interest in these issues.
- Increasing awareness of, and participation in local, national and international communities by College members - aided by tools on our website - linked with a corresponding external awareness of the College's involvement in all communities.
- Increasing awareness both inside and outside of the University, of the role of the College and its members in community activities and contributions.

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<sup>4</sup> Aim 4, excerpt from Donald Fisher (Vice-Principal), "Establishment of the UBC Emeritus College," UBC Emeritus College Newsletter, 1/2 November 2018.



- A national network is created of emeritus faculty engaged in the community that raises awareness and shares information on volunteer activities throughout Canada.
- An annual conference brings together emeriti groups, national and provincial, for sharing information and conducting research.



## STRATEGIC PRIORITY: Enhance recognition of the relevance and benefits of emeriti and the UBC Emeritus College to the University

The creation of an Emeritus College officially emphasizes the continuing relationship that emeriti have with their University, and the commitment of the University to facilitate the continuing service provided by emeriti to UBC. The College gives emeriti, as a group, a defined place — a collective home — within UBC. This priority reinforces the intention of the College to continue to ensure that the contributions and relevance of emeriti are known and recognized within the University administration and departments, and the local and global communities<sup>5</sup> and that these ongoing contributions are supported. In its formative years, the College was fortunate to have the support and recognition of the University President, who championed its creation. Given the transition of leadership that will occur during the term of this Strategic Plan, the College will focus on building strong relationships not only with the new President, but also more broadly across UBC.

Emeriti represent 20% of UBC academics and continue to teach, undertake research, supervise graduate students, mentor colleagues, sit on UBC committees including Senate and the President's Advisory Committee for Campus Enhancement, and act as administrators *pro tem* for University units. Over 100 emeriti are listed as Experts with UBC media relations. Emeriti bring expertise to community and business organizations, and lead or sit on provincial, national, and international scientific, professional, and government committees and commissions. Emeriti enhance the global impact and visibility of the University: they give radio and TV interviews, write opinion pieces for newspapers, have given hundreds of talks and conference presentations, and produced thousands of papers, books, and book chapters, each one crediting the University of British Columbia. They have trained, and continue to interact with, faculty in leadership positions around the world. Emeriti have given over \$50M to UBC and are important participants in UBC fundraising campaigns.

### Objectives & Activities

To achieve this priority, the following objectives and related activities will be pursued, with the aim of ensuring emeriti are more fully recognized as an integral part of the “whole UBC”:

- Demonstrate (with data) that the EC and individual emeriti contribute to activities that support critical academic and administrative functions and enhance the reputation of individual academic units and of UBC as a whole.

### Outcomes

Successful pursuit of this priority and related objectives will deliver measurable outcomes such as:

- Data is routinely collected on attendance at all EC events (by type).
- Input is regularly solicited input from emeriti on honours received; on service outside UBC (e.g., participation in/leadership of community, government and business organizations and panels; speaking to professional and public audiences; interviews for news outlets, speaking to

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<sup>5</sup> Aim 5, excerpt from Donald Fisher (Vice-Principal), “Establishment of the UBC Emeritus College,” UBC Emeritus College Newsletter, 1/2 November 2018.





professional and public audiences; conference participation/organization; publications, reviewing submissions for publication, editorships); service within UBC (e.g., teaching, student supervision, Ph.D. defence panelist; University committee and Senate participation); and research grants.

- Sharing of information is encouraged among emeriti on opportunities for service both internal and external to UBC; coordinate nomination process for Senate to ensure a cadre of emeriti are among the "Convocation" senators; support and supplement the Awards Committee to coordinate nomination processes for internal and external awards (e.g., Emeritus College, Alumni, OC, and OBC awards; Hon. Degrees).
- Coordination with HR, Workday leadership, UBC IT, Development and Alumni Affairs, the President's Office and the Senate Office ensures that one code is assigned to all emeriti and that a searchable, up-to-date database is maintained (within Workday if possible, and available to EC staff for data access and updating as required).
- Target UBC sources of requests for input (e.g., via surveys, participation on committees, working groups and focus groups) that don't already reach emeriti and/or do not provide "emeritus" as an identifier for respondents and have the omission(s) corrected.
- Systems are established for routinely obtaining data from UBC administrative and academic units on involvement of emeriti in teaching, graduate supervision, research grants, etc., to supplement self-reported data.
- Systems are established for quantifying the contributions of emeriti both within and outside UBC in terms of equivalent staff/faculty savings in academic and administrative units.
- Data and stories on contributions of emeriti and the EC are shared widely through UBC News releases, AROHE Matters, etc.
- Data and stories on contributions of emeriti are shared with Heads & Directors, Deans, Provost, President and Senates in periodic meetings and an annual report with emphasis on the saving of time (= \$) resulting from EC and emeriti activities that contribute to the strategic goals and reputation of UBC.



## STRATEGIC PRIORITY: Ensure the College is effective, efficient, and sustainable

This Strategic Plan is built on an effective, efficient, and sustainable College infrastructure. College members recognize both the tangible and symbolic value of the institutional support provided by UBC for College operations such as space, staff, and access to University administrative supports. These resources make College activities possible, facilitate productivity and deliver impact far beyond what would be possible for a purely volunteer-driven association.

At the same time, University assets alone are insufficient to ensure successful implementation of this Strategic Plan. Members who volunteer and remain active with the College in a range of roles are essential to its success. The UBC Emeritus College must be able to continuously attract and retain new leaders and active members to attain the strategic priorities in this Plan.

### Objectives & Activities

The objectives and some related activities furthering this priority will include:

- Develop a robust communication strategy to increase recruitment to the College, and engagement with its programs.
- Enhance the role of the Unit Reps through two-way communication.
- Clarify the roles of everyone involved in the College.
- Review activities regularly to make optimal use of human resources, time, and efforts. Align allocation of resources with priorities, particularly in support of communications and College committees.
- Implement a robust and sustainable volunteer leadership continuity plan to increase member participation in College structures and activities to create a succession pipeline.
- Provide timely, accessible training for use of technology to make the most of available tools. Integrate technology into activities.
- Strategically invest resources (including income from the College endowment as appropriate).
- Map out implementation of Strategic Plan both initially and as time progresses.

### Outcomes

These outcome measures will be tracked for evidence of increased College capacity and sustainability:

- The Emeritus College is widely recognized as effective by Emeriti and UBC with more engagement by emeriti.
- We have functioning unit reps for all units.
- Well defined roles and responsibilities provide clear direction to the College mission (on all levels—staff, committees, Council).
- There are acceptable levels of member, leadership, and staff satisfaction in key areas, including staff retention.
- Audits show that activities, communications, resource allocation and investment of effort are aligned with this plan.
- Volunteer recruitment and replacement plans guide successful leadership continuity.



- Goals and plans are in place for development and fundraising.
- Actions to be taken are decided, consistently with priorities among goals and available resources. Plans are revised periodically as goals are achieved, experience is gained, and circumstances change.