

Strategic Plan – Summary

Year 1: 2022-2023

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:

- 1) Enrich retirement for College members
- 2) Increase the community profile and involvement of the College and its members locally, nationally and internationally
- 3) Enhance recognition of the relevance and benefits of emeriti and the UBC Emeritus College to the University
- 4) Ensure the college is effective, efficient, and sustainable.

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. Working groups were established with a chair and members.

You can find the strategic plan in a separate document.

Year 2: 2023-2024

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.

At the retreat, it was noted that it was important to set realistic priorities to focus on in the coming year and enable implementation with available resources.

The report of the second retreat in 2023 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 and is available in a separate document.

In the second year, the Executive set priorities for the action items. All action items mentioned at this retreat were ordered under the relevant strategic priority mentioned above. There were many ongoing projects plus new action items. The action items were prioritized to eight goals which were then made SMART (Specific, Measurable, Attainable, Relevant and Time-bound).

The Executive made eight project plans for the goals (see overview on next page) and invited project leaders for each project plan in Spring 2024. This is where we are now and where we ask for your input. In the upcoming retreat, we'll look back at what was achieved and what we would like to achieve in the upcoming year.

Glossary

1. 2022-2023: 4 Strategic Priorities were set and are the same as the 4 Pillars.
2. 2022-2023 and 2023-2024: All action items were categorized under the most relevant pillar.
3. 2024: Based on the action items, eight goals were prioritized.
4. 2024: These goals were made SMART.
5. 2024: To implement the goals, eight project plans were created.
6. 2024: Project leaders were invited to lead the project plans in 2024-2025.

Project Plans

- | | |
|---|------------------------------|
| 1. Implement communication plan | Anne Junker (Communications) |
| 2. Opening Celebration for new UBC EC space | Bill McCutcheon (Executive) |
| 3. Create succession plan | Joost Blom (Past Principal) |
| 4. Development/Fundraising | Bob Armstrong (Development) |
| 5. Determine ways to connect personally with members | David Hill (Membership) |
| 6. Determine ways to reach non-tenure track faculty | David Hill (Membership) |
| 7. Generate lists and better tools for collecting data on UBC Emeriti | Anne Junker (Communications) |
| 8. Identify and update community volunteer opportunities | Ruth Derksen (SIG Volunteer) |

Project Plans 1 to 8

Pillar 1	Pillar 2	Pillar 3	Pillar 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
Project Plan 5: Determine ways to connect personally with members <i>(also pillar 4)</i>	Project Plan 8: Identify and update community volunteer opportunities	Project Plan 7: Generate lists and better tools for collecting data on UBC Emeriti <i>(and pillar 4)</i>	Project Plan 1: Implement Communication Plan
Project Plan 6: Determine ways to reach non-tenure track faculty			Project Plan 2: Opening Celebration for new UBC EC space <i>(also pillar 1, 2 and 3)</i>
			Project Plan 3: Create succession Plan
			Project Plan 4: Development / Fundraising

Year 3: 2024-25

The last retreat was held on September 11, 2024 to share the development of the different goals and look ahead to 2024-25. You can find the report of that meeting In a separate attachment.

In the overview below, you can find the current status of actions for 2024-25.

Below is a summary of the status of the projects:

Project Plans

Status

- | | |
|--|---|
| 1. Implement communication plan | Mostly complete.
Next step: make communication plan operational. |
| 2. Opening Celebration for new UBC EC space | Completed
Next step: none |
| 3. Create succession plan | Stalled
Next step: Priority for next plan |
| 4. Development/Fundraising | Completed.
Next step: create new plan |
| 5. Determine ways to connect personally with members | Mostly on track.
Next step: Reconsider for next plan |
| 6. Determine ways to reach non-tenure track faculty | Mostly on track.
Next step: Reconsider for next plan |
| 7. Generate lists and better tools for collecting data on UBC Emeriti | Mixed.
Next step: Reconsider for next plan |
| 8. Identify and update community volunteer opportunities | Complete.
Next step: make actions operational |

Status Strategic Plan 2024-25

Strategic Priority 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

Actions	Status			
	On Track	Stalled	Stopped	Complete
2023-2024				
Annual meeting March 2025				X
Unit reps' document revised				X
Appeal to department heads	X			
Follow-up on recommendations/referrals				X
Listing of job titles		X		
Determine communication tools		X		
Unit rep provided with names of retiree/potential EC members	X			
Annual meeting of unit reps reactivated				X
New unit reps recruited				X
2024-2025				
Have unit reps email department heads about emeriti	X			
Recruit unit reps at UBCO				X
Promote UBC Emeritus College in the Benefits/Retirement Seminar				X
Connect with those nearing retirement about EC in HR and Faculty Relations comms	X			
Enhance the role of and continue to recruit a full crew of unit reps	X			
Add a line in the welcome letter to people reaching retirement to update the EC office				X
Send a special invitation email to new emeriti and elected members	X			
Welcome new members with a PPT listing all their names at the first general meeting		X		
Broaden the EC membership base beyond constituent groups		X		
Expand UBCO membership in the Age-Friendly University Global Network to the rest of UBC		X		
Continue current activities to enrich member programs and benefits	X			
Use website and newsletter to promote member programs and benefits	X			

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

Activity	Status			
	On track	Stalled	Stopped	Complete
2023-2024				
Evaluate surveys				X
Document data in useable form				X
List (on website) volunteer organizations				X
List potential organizations for future engagement				X
Raise awareness among emeriti and overall UBC governance	X			
Designed survey re: volunteers				X
Transfer of convener status				X
Communicated with listserv re: volunteers				X
Called first meeting for Sep 17 at new location				X
2024-2025				
Put list of volunteer organizations on website and in newsletter				X
Post emeriti volunteer activities in EC's digital spaces	X			
Clarify how the College defines volunteering		X		
Provide recognition for emeriti volunteering	X			
Obtain reports from department heads on the number of emeriti volunteering to teach		X		
Be aware of political issues with emeriti volunteering in internal UBC activities		X		
Give awards a higher profile every year (i.e., newsletters, President's award)	X			
Provide opportunities for EC members to volunteer in activities to address major societal issues.		X		
Share volunteering metrics with the Vice Provost, President and Provost to promote knowledge of College contributions to UBC		X		
Scan UBC daily media listing for EC representation to pull data/set metrics	X			
Include short vignettes on what UBC EC volunteers are doing in person and online		X		
Revive list of jobs retirees did at UBC without compensation		X		

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

Activity	Status			
	On track	Stalled	Stopped	Complete
2023-2024				
Decide on Communications committee with comms manager support				X
Determine emeriti activities/details		X		
Determine communication tools to collect data		X		
2024-2025				
Establish UBC EC Data Collection Committee; recruit committee members			X	
Identify 5-10 areas of EC activities and contributions for data collection in the first year			X	
Share data collected with UBC			X	
Identify ways to encourage emeriti to self report		X		
Evaluate progress and establish success criteria to measure reach			X	
Develop a list of “snappy UBC EC facts” for easy promotional use				X
Develop a catalogue of stories to showcase success in retirement and ongoing contributions enhancing UBC’s reputation to profile in the newsletter and website	X			

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

Goal 1: Implement Communication Plan

Activity	Status			
	On track	Stalled	Stopped	Complete
2023-2024				
Finalize roadmap, which will include priorities				X
Established Communications Committee				X
Hired Communications Manager				X
Created Draft Road Map with Communications Consultant				X
2024-2025				
Finalize the UBC EC Communications Road Map				X
Implement priority projects (some already underway)	X			

Goal 2: Opening celebration for new UBC EC space

Activity	Status			
	On track	Stalled	Stopped	Complete
2023-2024				
Official opening ceremony of new EC space celebration (complete on April 7 – yeah!!) 😊				X
Tour of new space still under construction				X
EC staff moved into new offices				X
2024-2025				
Determine event timing				X
Implement the communications plan for the opening celebration				X
Develop program elements appealing to emeriti/members in the ceremony				X
Invite audiences				X

Goal 3: Create succession plan

Activity	Status			
	On track	Stalled	Stopped	Complete
2023-2024				
Recruit small project committee, ideally with recruiting experience		X		
Continue orientation sessions as regular practice		X		
Expand efforts to build list of potential recruits		X		
Develop template for describing member responsibilities and time commitments		X		
Develop process for encouraging multi-year terms		X		
First orientation meeting for incoming Council members				X
EC Office maintaining list of potential recruits				X
2024-2025				
Reach out personally to members who retired 2-3 years ago with the survey		X		
Build a pool of active involved emeriti		X		
Obtain list of emeriti about to retire to contact		X		
Talk to current faculty as people transition to retirement		X		
Update job descriptions with committee purpose, terms of office, and time expectations to clarify roles		X		
Consider renaming the program group a committee to provide structure that supports succession planning		X		
Invite new retirees to a gathering where UBC EC can make a pitch (e.g., President's reception)		X		
Post help wanted page on website to attract new recruits		X		
Develop a communication strategy to increase College recruitment		X		

Goal 4: Undertake development and fundraising

Activity	Status			
	On track	Stalled	Stopped	Complete
2023-2024				
Increase prominence of fundraising on website				X
Identify and prioritize projects with strong fundraising appeal	X			
Re-establish relationship with UBC Development				X
Re-establish Development Committee with ToR				X
2024-2025				
Confirm fundraising goal amount with the College executive and Finance Committee				X
Establish three priority strategies to achieve fundraising goal of \$100,000				X
Develop value proposition				X
Develop list of items for donors to contribute to (share with the UBC Development Office)	X			
Create a donor wall to motivate and provide recognition	X			
Invite UBC Director of Development, Gift & Estate Planning to sit on EC Development/Fundraising Committee				X
Co-organize/co-fund with partners to stimulate interdisciplinary discussions all can build on	X			
Align resources with College priorities		X		
Consider the pros and cons of free membership				X