UARA Focus Group and Strategic Planning Summary
August 21, 2019

Our Stated Purpose
☑ Promote the interests and welfare of UA Retirees;
☑ Provide continuing contact between Retirees and the UA;

Interest in Purpose:
HIGH: Social
MEDIUM: Advocacy
LOW: Fundraising

Educational
Service
Advocacy

Participating members value:
+ Interesting & unique tours and speakers
+ Opportunities to give back to the UA and broader community
+ Social events and learning opportunities (lunches, lectures, tours)
+ Interaction with other people who share the same experience of working for the UA
+ Relationships and friendships that are easily developed because of our shared experience
+ Working on planning newsletter, luncheon and activities
+ Cooperation received across the UA to support the UARA
+ Reconnecting with familiar faces
+ Getting input from soon-to-be retirees
+ Meaningful “encore” experiences

UAAA Staff values:
+ The shared desire of retirees to engage with the UA
+ Modeling for soon-to-be retirees how they can stay engaged

The Greatest Value we can offer to our future members:
+ Connections to other retirees
+ Opportunities to stay engaged with the UA
+ Access to unique learning experiences
+ Foster pride and connection to each other and the UA
+ Camaraderie (reducing isolation and promoting happiness)
+ Lifelong Learning
+ Information and support as employees transition into retirement

The Greatest Value we can offer the UA
+ Access to advocates and ambassadors who are ready and willing to engage
+ Resources and support for other (soon-to-be) retirees

Alexander Carrillo Consulting
Draft Summary of Notes

We can improve:
— How we communicate greater value to increase membership
— Partnership to augment existing other UAAA, UA and community programs
— Marketing and communication
— More participation and leadership
— Member recruitment

What will it take?
☐ Alignment with UA priorities (i.e. Five Pillars/Student Success)
☐ Active, personal recruitment for membership and leadership
☐ Dynamic online content and mechanism for registration and payment
☐ New strategies for communication including social media, website, electronic newsletters
☐ Meaningful and unique engagement opportunities (different from OLLI, etc.)
☐ More and diversified financial resources (beyond annual membership)
☐ Annual fund drive (Challenge/Match?)
☐ Benchmark data and ideas of new models from peer institutions
☐ Data about UA retirees: age, post-retirement employment, etc.
☐ More information about how retirees want to engage. (i.e. Funding and/or selecting scholarships? Facilitating career opportunities? Mentoring?)
☐ Functional by-laws, policies & procedures

From Mark Acuña, UAAA VP of Student and Alumni Engagement:
☑ Recent Retirees are like Recent Alumni: we need to demonstrate relevance before asking them to engage
☑ Think about “Micro-Engagements”... Small opportunities that provide opportunities to connect and show value.
☑ President Robbins cares about data, impact and the new strategic priorities (5 pillars)
☑ The UAAA hosts over 300 events annually. Retirees could be invited to many of these events. Opportunities to partner together are MANY.

SUMMARY OF PRIORITIES:
RELEVANCE: Create and promote relevance to targeted audiences, including University, Current and Future Members
ENGAGEMENT: Provide access to unique, meaningful experiences
CONNECTIONS: Foster ongoing connection with the UA and between retirees

Proposed Board Leadership after October:
President – VACANT
Vice President – VACANT
Secretary – Gail
Treasurer – Jane
## NEXT STEPS

<table>
<thead>
<tr>
<th>Action Items</th>
<th>Timeline</th>
<th>Responsibility</th>
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<tbody>
<tr>
<td>Develop script &amp; talking points for meeting with Dr. Robbins</td>
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<td>Jenny</td>
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<tr>
<td>Meeting with Dr. Robbins</td>
<td>August</td>
<td>Dotty, Gayle, Alison, David, Jim &amp; Robert</td>
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<td>- Prepare by reviewing and assigning talking points</td>
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<td>- Be familiar with UA Strategic Plan (5 Pillars)</td>
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<td>Monthly Newsletter distributed to all retirees</td>
<td>1st week of each month</td>
<td>Robert &amp; Committee with support from Denise</td>
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<td>Phone list of members and recent retirees to recruit new leadership and invite to President’s Reception</td>
<td>Before President’s Reception</td>
<td>David</td>
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<td>Bio5 Tour</td>
<td>Fall TBD</td>
<td>Jim</td>
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<td>President’s Reception at Old Main</td>
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<td>All board members</td>
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<td>- Identify potential members for Working Group</td>
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<td>Denise, Dotty</td>
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<td>- Develop and send invite to all Members</td>
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<td>- Share talking points with all attendees</td>
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<td>Nominate potential Working Group members ensuring</td>
<td>Fall 2019</td>
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<td>- Diversity across functions and demographics</td>
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<td>- Innovative thinkers</td>
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<td>- Influence among peers</td>
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<tr>
<td>Board Meeting</td>
<td>October</td>
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<td>- Elect New Officers</td>
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<td>Luncheon</td>
<td>October</td>
<td>Dotty</td>
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<td>Investigate social media</td>
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<td>Mike Crebs</td>
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<td>Research other retiree organizations at other Universities. Identify innovative models and benchmark data.</td>
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