

The Magic Ingredients of Success of the UCSD Retirement and Emeriti Associations Spring 2015

Key Ingredients

- Enterprising, committed and enthusiastic Director
- Committed staff – Only three FTE, spread among six part-time positions (4 part-time Work-study students) + Director.
- Retirement Resource Center, strategically-located in the heart of the campus (with versatile facilities which can accommodate seminars for 60, and formal dinners for 30)
- Cooperative / supportive VC and HR Department

Reeling in new members

- Forwarding service for UCSD e-mail address (requires RA membership) – The “hook”! plus UCSD ID card/library access
- Four “ready-2Retire” seminars per year
- Two outreach mail solicitations per year
- Fall and Spring Retirement Forums (3 classes: Pension options, Retirement Benefits and Five Keys to a Successful Life in Retirement)
- Membership Outreach tables at various campus, SIO and Medical Center events

Keeping members coming back!

- Event-packed color newsletter published 9x year distributed via snail-mail and email.
- A wide variety of specialty interest groups: Fiction Book Club, Health and Wellness, International Films, Investments, Walking Group.
- Useful series of important seminars for aging adults: Social Security, Medicare, Social Security – Advanced Strategies, Long Term Care Planning, Home Care Options, Home Health Care, Estate Planning, Fiduciary Services, Moving & Downsizing,
- Many free or low-cost events & activities
- Four subsidized anchor social events per year
 - Summer Picnic, Annual Lunch, Spring Lunch, Holiday Party

Active & involved Board of Directors

- Board & committees meet monthly (all on the same day)
- Board members actively attend many events
- Many new program ideas generated by the Program Committee
- Fresh ideas with new Board members each year
- Full day Summer Workshop – Board Orientation

Multi-Platform Regular Communication with members

- Three listserv options for members to choose from
- “Next Week at the UCSD Retirement Association”
- Facebook posts of upcoming events, and photos of past events
- Twitter feed – upcoming events
- Full-color Print and E-Gazette – 9x per year.

Active RA Volunteer Program 1800+ hours per year donated

- Volunteer Opportunities advertised in Gazette
- Volunteer Committee organizes volunteer events
- Active core group of some 50 regular volunteers
- Gazette Groupies – volunteers pitch in to do Gazette post production (folding and labeling), resulting in a great cost and time savings!

Annual Retention Efforts

- Annual invoice & member survey in May
- Five retention contacts to get renewals in the door, including snail mail, email and phone (going back two to three years each cycle)
- Dropped membership results in loss of email and dropped from listservs thus loss of contact

UCSD Emeriti Association

- UCSD relatively “young campus” with some early faculty still active in EA
- Many faculty members live near UCSD (if purchased homes years ago!)
- Parking (until recently) relatively easy
- Emeriti enjoy regular intellectual engagement through lectures, seminars, open to active and retired faculty (EA membership not required)
- Most Emeriti also members of the UCSD RA and enjoy participating in many RA events

EA Active & Involved Exec Committee

- Active EA Executive Committee meets monthly
- Program Committee generates top-notch, monthly lectures by current faculty
- Fresh ideas with new Exec members each year
- Awards committee – Dickson & Panunzio Awards
- Full day Summer Workshop – Board Orientation

Superlative Emeriti Chronides

- Published four times/year
- Edited by Professor Emeritus Sanford Lakoff, Dickson Award Winner
- Professional layout by Suzan Cioffi
- Distributed via email campus-wide

Annual Emeriti Retention Efforts

- Annual invoice & member survey in May
- FOUR retention contacts to get renewals in the door, including snail mail, email and phone (going back two to three years each cycle)
- Typically only lose members from death or moving out of the area.

Chancellor's Scholars Program

- In 8th year for 40+ top scholarship recipients each year
- Each CS student assigned an Emeriti mentor
- Weekly discussion groups with feedback from mentors
- Individual meetings between mentors and students
- Etiquette dinner each year
- Program described in more detail at CUCEA meeting yesterday

The Magic Ingredients = "DIMPLES"

Dedication

Innovation

Marketing

Management

People

Leadership

Excellence

Service

Presentation given before the Spring 2015 Joint CUCRA/CUCEA meeting

Prepared by Suzan Cioffi, Director, UCSD Retirement Resource Center

Home of the UCSD Retirement Association with 1800 members

the UCSD Emeriti Association with 530 members and the

Chancellor's Scholars Program/Emeriti Mentor Program

9500 Gilman Drive, La Jolla, CA 92093-0020

RetireeLink@ucsd.edu/Emeriti@ucsd.edu

<http://Retirement.ucsd.edu>

Phone: (858) 534-4724