

UCLA Retirees' Association Fall 2011 Report to CUCRA

Let me start by giving an update on our progress for the last six months. We labeled FY2010-11 a 'Transitional Year,' and it lived up to its name in every way. As mentioned in the Spring 2011 CUCRA Report, we held a retreat a year ago to identify our strengths, weaknesses, opportunities, and threats. This led to the identifying numerous goals, which we have spent the year in addressing.

An oversimplification of the goals was to (1) create a succession plan, which unexpectedly led us to look in-depth at our ByLaws, (2) develop a financial plan, (3) increase member participation on the Board, on committees, at events, etc., (4) grow membership, (5) increase visibility, and (6) enhance use of technology.

Both succession planning and the Bylaws were related. It took half a year to discuss succession planning and a full year to discuss and finally approve a new set of Bylaws. These were major undertakings. The nominating committee now has the task of identifying new board members to appoint from an updated list of prospective board members, keeping in mind updated responsibilities and a greater vision of the future, which includes not only providing expanded social opportunities for members, but an increased importance on volunteering, and a new emphasis on campus and community relations.

The financial planning model was started and will finish this year. We want to look at costs from a direct and indirect perspective, identify core expenses that are covered by membership fees, determine the number and types of events needing subsidies by the Board, and allocate accumulated balances wisely to allow membership fees to stay low, set aside funds for reserves, and have funds for special projects. Everyone has an opinion on how best to use these funds! The challenge will be to find an acceptable medium.

Finally, the membership discussion had to be delayed for discussion until this year. We simply did not get to this topic. We plan to start the discussion with a two to three hour brainstorming session, which will be similar to the retreat a year ago; and from there, we will have a number of points to discuss for the rest of the year.

Thus, the 'Transitional Year' will continue into a second year. Since we couldn't get it all done in the first year, and there were still major issues to be discussed, the Board decided to make an unprecedented decision to extend everyone's term of office by a year in order to allow for the continuity and consistency in discussions to continue. It was a wise decision as we now start the new year.

Everyone is back from vacation and is ready to go! Right now, our time is being focused

toward our 7th Annual UCLA Retirees' Association Arts and Crafts Show, which will be held on November 10th.

Submitted by John Dahl, 2011-12 President of the UCLA Retirees' Association