

UCLA Retirees' Association Spring 2011 Report to CUCRA

It's been a busy time for the UCLARA Board. Only six months have elapsed since the last report was presented to CUCRA, but time has gone fast, a lot has been accomplished, and there is still more to do.

If you remember from the last CUCRA update, this year was labeled a 'Transitional Year.' We started out by having a retreat in the summer to identify our strengths, weaknesses, opportunities, and threats, which led to identifying a number of goals to work on during the year. This exercise set the stage for our discussions at the monthly Board meetings.

Our first goal was to address succession planning, particularly to identify the next President and Vice President/President-Elect. This discussion led us to ask what qualifications we wanted in individuals serving in these positions and what term and term limits would be appropriate. We found in particular that these two positions require a commitment in time, something that retirees don't seem to have much of today because of their active lives.

These changes required us to update our Bylaws. Not wanting to make updates yearly, we decided to take a long, hard look at the Bylaws anticipating that any changes made now would last at least five years. We looked at all Board positions and their roles on the Board. This included elected versus appointed positions and recognition that some positions needed to be redefined.

Another immediate goal was developing a financial plan: setting forth a two to three year budget and understanding our income and expenses. We agreed not to change membership fees at the moment. However, expenses needed much more discussion. We wanted to look at reducing costs but more importantly, we wanted to reformat our financial statement to better categorize our expenses into direct (core) vs indirect (overhead) and determine what programs and events should be subsidized. This will help us plan and track our

activities in the future, identify core services to our members, and allow us to identify special projects to start or support.

Other issues cropped up in our discussions. We needed to look closer at our events and travel programs. Are they given too frequently? Is high or low participation related to cost and frequency of events? Do our members prefer day trips rather than overnight trips? How do we sponsor programs in a geographical area that has so many opportunities and to retirees who 'have already been there and done that!

Finally, our long term goal is to address membership. We started this discussion last February, and it will continue through the summer. This is the core issue. It's where we receive our income. It's to whom we direct our efforts, whether it is quarterly newsletters, putting on events, getting together for a holiday party, or pulling people together to volunteer and give back to the university. There is so much to talk about here. Further, whatever we discuss in membership transcends financial planning, events, travel, our relationship with the University, etc.

None of the above has mentioned the Affiliation Agreement that Eddie Murphy has worked on so diligently for over a year now. Because of her efforts and dedication, the UCLA Retirees' Association now has an agreement with UCLA Chancellor Block that recognizes us as an organization under UCLA. This was a monumental occasion when all of Eddie's work gelled and the document was signed. Thank you Eddie!

Submitted by John Dahl, 2010-11 President of the UCLA Retirees' Association