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.
- 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 Chronicles

- 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
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Home of the UCSD Retirement Association with 1800 members
the UCSD Emeriti Association with 530 members and the
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