

University of California, Davis
Development & Alumni Relations
VERSION B – Unit Business Plan – Narrative
FY 2015-16

Unit: UC Davis Retiree Center

Submitted By: Sue Barnes

Title: Director

Date Submitted: 4/1/2015

1) MISSION STATEMENT FOR YOUR UNIT/AREA:

Briefly state the mission and/or overall objectives of your unit.

The UC Davis Retiree Center's primary mission is to help our retired faculty and staff to continue a strong connection to the university. The Center will facilitate a role for retirees in the campus community and enhance the quality of life in retirement by providing access to professional resources specific to the needs of retirees. We achieve our mission by supporting the work of the Emeriti and Retirees' Associations and providing programs and services that support retirees at the UC Davis and UC Davis Health Systems locations, and contribute to the continued well-being and creativity of all retired faculty, staff, and their families.

2) PROGRAM GOALS:

Describe your unit's main goals and/or main objectives for 2015-16. These should all be measurable. If you are a unit with development metric goals, please use Version B - Attachments I and II.

We plan to continue to offer a wide array of programs and services for UC Davis retirees and current employees preparing for retirement:

- **Programs:**
 - Plan Retiree Fall Fest in September 2015 with at least 100 participants
 - Implement four-week "Transitioning to Retirement" class series (separate sessions for faculty and staff within five years of retirement) during the first half of winter quarter
 - Implement a second four-week "Transitioning to Retirement" class series to be held on the Sacramento campus during the second half of winter quarter
 - Sponsor annual New Retiree's Reception in June 2016 with at least 200 participants
 - Schedule retirees for individual consultations with Fidelity
 - Coordinate quarterly day trips to regional attractions averaging 40 participants per trip

- Coordinate quarterly tours of different campus venues on the Davis and Sacramento campuses averaging 25 participants per tour
- Continue to develop resources for widows and widowers, including a webpage of resources, a checklist of tasks to complete after the death of a loved one, and a quick-reference sheet; increase personal outreach after hearing of a death
- **Communication with retirees:**
 - Provide resource and referral information to retirees via in-person contact, telephone, or email with a 24-hour response time during operating hours
 - Send weekly email updates to all retirees for whom we have email addresses
 - Increase efforts to obtain retiree email addresses, with the goal of growing our email database by at least 15% (currently have 2,900; goal to be 3,200 by May 2016)
 - Publish the Retiree Center *CenterNews* bulletin as directed by Retiree Center Advisory Committee
 - Send welcome letters to all new retirees each quarter
 - Maintain and update Retiree Center website on a weekly basis
 - Maintain and update Retiree Center ADVANCE database on a daily basis
 - Print and distribute “Stay Connected” brochures, bookmarks, calendars and other outreach materials as needed
 - Connect retirees with volunteer opportunities on both campuses as they become available; update listings on website and include new opportunities in email updates
- **Outreach to current employees:**
 - Assist with Health Care Facilitator Program (HCFP) workshops for retirees in fall and spring quarters
 - Publish “Steps to Retirement” brochures, “Four Pieces of Retirement” display/handouts and other employee outreach materials as needed
 - Table at employee events including TGFS events, new employees’ luncheon and Quarter-Century Club dinner
 - Submit articles for DEVAR departmental newsletter on activities of the Retiree Center at least quarterly
- **UC Davis Retirees’ Association and UC Davis Emeriti Association support:**
 - Provide administrative support for monthly BrainFood talks or general meetings and annual holiday luncheon
 - Organize elements of monthly board meetings, including room rentals, refreshments, agendas and other meeting materials
 - Maintain membership databases and coordinate all membership activity
 - Update association websites on a weekly basis
 - Coordinate retiree and emeriti awards (Picnic Day honoree, Dickson, Distinguished Emeritus/a, Panunzio)
 - Assist with Video Records Project as needed
 - Design and publish association brochures as needed

- **Partnerships/sponsorships:**
 - Renew agreement with University Retirement Community to fund the printing/ mailing of the Retiree Center calendar and catering of the New Retirees' Reception
 - Renew agreement with Paradise Valley Estates (CCRC in Fairfield) to cater the Retiree Resource Fair and the Fall Retiree Meeting
 - Develop sponsorship agreement with Atria Covell Gardens, a Davis retirement community
 - Build relationships with additional retirement communities such as Carlton Plaza in Davis and Eskaton in Sacramento; explore their interest in sponsorship opportunities
 - Continue to pursue Fidelity Retirement Services and SAFE Credit Union as sponsors of the Transitioning to Retirement class series
 - Offer at least one co-sponsored program with other DEVAR departments (Alumni Relations, Planned Giving, Scholarships, etc.)
 - Incorporate travelling emeriti into CAAA events
 - Co-sponsor multi-day trip to Europe with CAAA in spring 2016
 - Continue to collaborate with UCDEA and the health system dean's office to develop programs for health system emeriti, with the following goals:
 - Co-sponsoring with the dean's office to host three emeriti luncheons during 2015 - 2016
 - Working with the dean's office and development office to create a plan to staff a health system Retiree Center office on a part-time basis.

3) BUDGET:

Does your plan require additional budget needs beyond base budget? If so, please explain.

We will be submitting a budget of \$56,200 (the same budget amount we submitted for 2013 – 2014). We will experience increased costs for the Transitioning to Retirement classes due to moving to a larger location and adding classes at the health system.

4) PROFESSIONAL DEVELOPMENT:

In an effort to help enhance success for DEVAR, please comment on professional development goals for your unit - additional professional training you would like your unit to receive this year, staff training topics your unit would like to help lead this year, etc. Also share special challenges your unit faces and how these can be addressed, further ideas for strengthening your unit Development Program, ideas for strengthening the UC Davis Development and Alumni Relations program overall this year, etc.

We would like to participate in any training opportunities that can help us to further the mission of DEVAR. In particular, we would like to continue to receive training on successful relationship-building strategies that can be used to develop a culture of philanthropy among retirees.