Emeriti Association of California State University, Los Angeles

**Strategic Planning Meeting**

**October 29, 2004 ·Long Beach Yacht Club**

The following are flip chart notes generated through the strategic planning process facilitated by Kristina Brook, Owner of K & M Enterprises (805.375.5742) on October 29, 2004.

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| IDENTIFYING NEEDS OF EMERITI ASSOCIATION MEMBERS* Serve Emeriti - inform members (i.e., about retirement issues)

 - help Emeriti continue area of interest and/or research* Serve University
	+ - Staff
		- Students
		- Faculty
		- Administration
* Fellowship X X X X X X (many votes)- Structure opportunities for social fellowship and collegiality.

Campus Community – Academic Campus Senate* Realize the value of Emeriti to the University
* Scholarships
* Life after retirement – sharing with faculty
* Maintaining continuity
* Aging and ill health of members – communicating with them
* OLLI
* Current information about benefits: health and finances
* Elder hostel
* Could the Emeriti persuade all academic departments to invite an emeritus to attend (briefly) a department meeting to speak about being an Emeritus/Alumnus?
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| **STRENGTHS*** 750 “man” years collectively to bring to bear on

University Community, and community at large.Depth of knowledge and experience in a wide variety of areas/disciplines.* Members have time to given now that they are not full-time employees

(This is fairly well publicized.)* Growing numbers – don’t have to recruit
* Good relations with administration and good support
* Good relationships with faculty and Statewide Association

Guaranteed rights – were approved by Senate and PresidentNeed be watchful of these rights:* Right to use Library
* Parking
* E-mail
* Important financial link to the alumni and Emeriti Association
* ***History needs to become part of the University’s future.***
* Emeriti Association newsletter and website - very great tools
* Gala awards sessions – hosted by University Alumni Association
* Are organized to give scholarships
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| WEAKNESSES* Lack power (i.e., influence and involvement) in comparison to when they were full-time faculty
* Some are too busy
* Not consistently informed of changes in Departments/University
* Campus not completely aware of the collective resources of Emeriti Association
* Need to connect with Emeriti to invite them to events
* Some Emeriti leave - Upset
* Uninterested
* Was just a job to get through
* On campus information needs to be communicated in meetings
* Broken demonstration equipment (i.e., when Emeriti are invited to do community presentations at schools, equipment is sometimes not available or not in good enough condition to go out to the schools)
* Public relations – not an organized way to convey accomplishments of the Emeriti Association
* Emeriti Times is good. But it doesn’t have a large enough distribution. Currently, the publication goes out to 500 Emeriti Association members plus 200 others. The current press run is 700 people. Could add 700 more to the distribution by mailing to current faculty, but there are cost considerations.
* Not enough communication/outreach re: scholarships (i.e., history fellowship wasn’t given out this year. Some faculty believe the amount given out is too small to warrant putting an application together to ask for the award)
* Need to generate enthusiasm among retirees to build financial base
* Agendas need to have interesting topics/discussion

Emeriti Association Endowment is currently $50,000 -- if the base (i.e., the corpus) was larger the fund could generate better earnings-or- if funds are combined that would grow the endowment.* Not a faculty/residential atmosphere
* The paradox of growth – growth weakens bonds in some cases
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| **OPPORTUNITIES****OLLI**  - Don, Barbara and Peter are the liaisons for this effort Community Service Opportunities* Reading for Blind
* Mediation
* Elementary and High School demonstrations (i.e., physics, demos, travels, archeology discussions)

University Service Opportunities* Mentoring – students and faculty
* Outreach - interns to recruit students to high schools and community colleges. (concept is in place, but help is needed)
* Increase number of students for summer session. This work needs special attention.
* Tutoring in Math and English
* Helping with department newsletters (e.g., busy work such as labeling and stamping newsletters) and also help with writing articles for the newsletters
* Science High School – Emeriti Association is central to this
* Help graduate students with Master theses

University Service Opportunities/Public Relations Opportunities* Meetings with Deans/Presidents of colleges – Good PR and good opportunity to share Emeriti Association. Could invite Deans to meetings.
* Building to bridges to alumni (students and faculty) and to VP of Development for financial resources. A special effort should be made to reach out to older Alumni who know the Emeriti.
* Connect with University Alumni Association
* Emeriti programs for the University Community – colloquia
* Use the President’s Associates model of $1,000 minimum for the Emeriti Association (two-birds-with-one-stone approach)
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| **OPPORTUNITIES, cont.**Association Service* Speak to University about designated Emeriti office/center and/or a multiple person office
* Use of carts to get disabled faculty from parking lot to on-campus events
* Infrastructure of organization – relook at this
* Monthly meetings/current University topics should be discussed
* Spouses – membership qualifications and dues/Association membership dues
* Cal State Long Beach has Senior University. Can CSULA Emeriti Association get such a program for Los Angeles campus?
* Fun (i.e., camaraderie)!!

Association Service/Public Relations* Emeriti Association brochure needs to be updated
* Emeriti Association and handbook is needed
* Could think about other ways to distribute Emeriti Times (i.e., website)
* Smaller one-page document might be needed to circulate to departments

Fellowship/Fundraising/Money Management* Increase dollar amount of scholarships. At $600 per scholarship, the amount is considered too low by some people. If the amounts were larger then there would be more awareness about the fellowships that are available. Perhaps several small pots of money could be combined.
* Approach Foundations to get 1:1 match of the scholarship funds generated by the Association
* Consider slight dues increase to obtain more money for scholarships
* Consider giving undergraduate scholarships
* $10,000 named fund opportunities current exists -- used to be $5,000. The Association does not get interest until the named fund becomes endowed at the $10,000 level. There is also a one-time 5% administrative fee so the gift being sought is really $10,500.

Fellowship/Public Relations* Remittance envelopes (i.e., for scholarships)
* Possibly ask the Alumni Association to name one fund for the Emeriti Association scholarship fund
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| THREATS* Change is difficult
* Some departments have Emeriti office space on campus – some don’t because there are space issues such as those created by hiring of several part-time faculty
* Budget issue – mailing costs if Emeriti Association increase distribution of the Emeriti Times. If the Association takes on the task of distributing more issues of the Emeriti Times, then the President’s office might think that the Association does not need the financial help to do their regular mailing. To avoid the confusion (i.e., the Association does need the financial support of the President’s office for mailings), the Association could ask for an increase in postage help for at least a finite amount of time.
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**Each member present at the October 29th strategic planning meeting was asked to volunteer for one or two Opportunities categories in which they would like to participate. The following is a list of the categories selected by members present at the October 29th strategic planning meeting.**

**Community Service** – Peter Olli, Harold Demo and Janet (Read for Blind/Elem)

**University Service** – Barbara, Peter Bridges and Harold (Science High School)

**Association Service** – Internal Barbara, Frieda, Leon, Don B., Don D., Lou, Joan, Jackie, Len, Bob, Karen and Demetrius

**Public Relations** – Don Dewey, Demetrius, Frieda

**Fellowships** – Janet, Joe, Clem, Don, Ken, Lou, Joan, Jackie and Bob

***Another idea for participation: Involve other Emeriti (i.e., not just the Executive Committee) to help with tasks on the scopes of work also.***

The following page is a blank Scope of Work sheet that can be used when filling out Scopes of Work for each opportunity that was identified above. The group prioritized the first category of the opportunity that they wanted to begin with and that was **Association** **Services.** The group worked on one opportunity from the **Association Services** category as an example of how to complete Scopes of Work. The results of that work follows the blank Scope of Work page.

SCOPE OF WORK

**Goal 1**:

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| **Measurable Objectives** | **Implementation Activities** | **Timeline/Person Responsible** | **Methods of Evaluating Objective(s) and Documentation** |
|  | 1.11.21.31.4 | 1.11.21.31.4 | 1.11.21.31.4 |

SCOPE OF WORK

**Goal 1:** To create greater interest among Emeriti faculty, regular faculty, and administrators, to influence the direction and welfare of the Emeriti Association and the University as a whole.

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| **Measurable Objectives** | **Implementation Activities** | **Timeline/Person Responsible** | **Methods of Evaluating Objective(s) and Documentation** |
| * 1. Streamline business meetings. Streamline agenda. Add timeframe to agenda items.
	2. Increase interaction with University functionaries.
	3. Encourage written reports to increase efficiency of meetings when appropriate.
	4. Chair does informational meeting with the Deans, Provost, and President. Set topics.
* Money is an attractive subject
* Science High School – President
* Summer Quarter
 | Try an extended meeting – split meeting (1 hour – speaker, 1 hour – business meeting)(5) Dean meetings – speakers/exchangeBusiness meetings - 6/year with a 2-hour agendaFellowship Events – winter, fall, annual springCommunicating about the meeting – postcards.23 x 300 = now mailed = $69.00 for postage plus the cost of the postcardsDevelop listsrv to save on postageFuture meetings – invite all Emeriti | Barbara Sinclair sets agenda Chair invites Deans, Provost, President Clem /Chair-or- group invites guests based on topics Continue talking November 5, 2004Invite the President to speak about Science High School and Summer Quarter at January 13, 2005 meetingDemetrius/Harold develop listsrv by February 2005 | Evaluate progress of new agenda format in May 2005 |

SCOPE OF WORK

**Goal 2:** Increase the value of the Emeriti Association by showcasing the Association’s benefits. Strengthen the Emeriti Association base.

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