

VISION: Celebrating Our History, Securing Our Future

STRATEGIC PLANNING RETREAT 2021-2022 ACTION PLAN

On August 31, 2021, the Board of Directors of the UNM Retiree Association held a strategic planning retreat. The goal of the retreat was to discuss problems and challenges facing the Retiree Association and build an action plan for the upcoming year. The Board discussed pertinent issues and/or concerns, and each committee chair provided a report of the prior year's activities and planned goals. The Board set Committee and Board goals for 2021-2022, which are listed in the following Action Plan with related tactics.

Board Goals

BOARD GOAL #1: Increase available funds by developing a donation campaign.		
TACTICS	DESIRED OUTCOME	LEAD
Look for individuals to match donations.	New, sustainable revenue streams.	Treasurer & Membership Communications Chair
Tie requests to specific uses such as scholarships for students.	New, sustainable revenue streams.	
Provide information on how individuals can donate part of their retirement account (RMDs--required minimum distributions).	One-time increases to funding.	
Seek guidance from the UNM Foundation. Seek development staff support from the Provost's Office.	Identify successful methods for seeking donations.	M. Dougher working with S. Borbas
Presidential Scholarship	Determine Viability of continuing UNMRA relationship with UNM foundation on scholarship.	President & Terry Mulert (UNM Foundation)
BOARD GOAL #2: Graduated/phased retirement.		
TACTICS	DESIRED OUTCOME	LEAD
Meet with UNM Administration to determine interest.	Build support.	M. Dougher and B. Bova
BOARD GOAL #3: Archive UNMRA information.		
TACTICS	DESIRED OUTCOME	LEAD
Sort through documents in the UNMRA office-- scan or throw out.	Effective storage of important historical information.	President and Past President
BENEFITS GOAL #4: Build strong relationships with UNM administrators, Faculty Senate and Staff Council presidents, and union leaders.		
TACTICS	DESIRED OUTCOME	LEAD
Invite a guest(s) to select Board meetings.	Networking and information sharing.	President, Chairs of Benefits and Legislative Committees.

Benefits Committee

BENEFITS GOAL #1: Inform the Board of any actions that will impact retiree benefits.		
TACTICS	DESIRED OUTCOME	LEAD
Continuously monitor what is happening to benefits through the Faculty Staff Benefits Committee.	Ability to be pro-active and correct or avoid any negative impact to retirees.	Benefits Co-Chairs
BENEFITS GOAL #2: Provide information on all UNM benefits available to retirees in one place. Enhance communication on post-65 insurance and networks.		
TACTICS	DESIRED OUTCOME	LEAD
Enhance the current over 65 Vendor Fair. Possibly extending the open enrollment period.	Increased information for retirees.	Benefits Co-Chairs
Work closely with HR and the Office of Academic Personnel.	Refinement of processes to ensure retirees have access desired benefits.	M. Dougher: work with Provost Office;
Develop the Benefits section of the Board promotional video to inform retirees of all the things UNMRA does for them. Think promotional video is on hold.	Increased involvement by retirees in the activities and advocacy actions of the UNMRA.	Benefits Co-Chairs
BENEFITS GOAL #3: Seek more flexibility in insurance benefits to allow for a lapse in coverage for both retirees and employees who can be covered by a spouse's or other insurance plan <u>while still having the ability to sign up for UNM coverage at a later date when the need arises.</u>		
TACTICS	DESIRED OUTCOME	LEAD
Determine any impact on VEBA and how to mitigate any problems.	An understanding of the impact on VEBA.	Benefits Co-Chairs
Get insurance data from HR to determine current costs by category for employees and retirees.	Develop a spreadsheet that can be used to determine potential savings for UNM.	Benefits Co-Chairs
Conduct a survey of staff, faculty, and retirees to determine how many could get coverage under an alternate plan.	Data to develop a spreadsheet for a cost/benefit analysis.	Benefits Co-Chairs
Based on survey-- identify individuals in each group that could provide specific insurance costs/savings.	Develop individual models as examples to management on specific costs savings.	Benefits Co-Chairs

Communications and Development (Renamed)

COMMUNICATIONS/MEMBERSHIP GOAL #1: Monitor UNMRA website to ensure it is kept up to date.		
TACTICS	DESIRED OUTCOME	LEAD
Seek IT assistance from HR. Ask membership if anyone has IT expertise to assist with updates.	Effective, efficient website; improve use/ease of email.	Communication and Development Chair and B. Adams

Determine value of other touchpoints i.e. Instagram, Facebook, Snapchat.	Identify best ways to communicate with retirees.	Communication and Development Chair
COMMUNICATIONS/MEMBERSHIP GOAL #2: Enhance acknowledgement of members.		
TACTICS	DESIRED OUTCOME	LEAD
When thanking members for renewing their dues, also acknowledge Life-time members annually and ask for an additional donation.	Greater involvement by membership and increased funds	Communication and Development Chair; Treasurer
COMMUNICATIONS/MEMBERSHIP GOAL #3: Develop ways to effectively use UNM News Minute, Instagram, Facebook, Snapchat.		
TACTICS	DESIRED OUTCOME	LEAD
Ask membership if anyone has expertise with social media and can assist with these platforms.	More timely and enhanced communication with members.	Communication and Development Chair
Set up a process for committee chairs to communicate important information to faculty and staff.	Share information and build relationships and support for issues.	Communication and Development Chair
COMMUNICATIONS/MEMBERSHIP GOAL #4: Expand membership.		
TACTICS	DESIRED OUTCOME	LEAD
Work with President's Office on the annual reception for new retirees.	Get new members and emails for potential new members	M. Dougher and R. Burford
Ask current members to ask friends to join and tell their friends it's the best way to be informed about changes to UNM and ERB benefits.	The personal touch is more successful.	Communication and Development Chair
Send a big mailing for new members—get group together to do mailing.	Effective, efficient use of resources. Worked well last year.	Communication and Development Chair
COMMUNICATIONS/MEMBERSHIP GOAL #5: Committee name changed to Communications and Development		
TACTICS	DESIRED OUTCOME	LEAD
Determine if any changes are needed to the UNMRA bylaws for new Committee name. Make changes on website/.	Updated bylaws in necessary and updated website.	Communication and Development Chair; Past president

Program Committee

PROGRAM GOAL #1: Expand committee membership.		
TACTICS	DESIRED OUTCOME	LEAD
Ask Communication and Development Committee to include a statement saying we are actively recruiting members for the Program Committee.	Recruitment of 2-5 committee members	Program Chair with Communication and Development Chair

PROGRAM GOAL #2: Implement annual meeting, holiday party, and strategic planning retreat.		
TACTICS	DESIRED OUTCOME	LEAD
Set dates, select locations, obtain speakers, and identify any special requirements.	Positive events for members and the Board.	Program Chair
PROGRAM GOAL #3: Get new ideas for programs		
TACTICS	DESIRED OUTCOME	LEAD
Conduct a survey of members which will be repeated every 3 years.	Identify member interests.	Program Chair with Communication and Development Chair
Develop social activities 6 months in advance.	Increase Participation in membership	President, Program Chair & Program Committee members
PROGRAM GOAL #4: Develop checklist for each event or program.		
TACTICS	DESIRED OUTCOME	LEAD
As future events or programs take place develop a specific checklist.	A tool for UNMRA volunteers and administrative support staff to use for smooth planning and ensuring nothing critical is missed.	Program Chair

Legislative Committee

LEGISLATIVE GOAL #1: Build relationships with new legislators, key legislators, governor, or staff.		
TACTICS	DESIRED OUTCOME	LEAD
Contact them and provide education on the importance of protecting active and retirees' defined pension benefits.	Build support for protection of benefits.	Legislative Chair and Co-Chair
Help them understand how ERB pension benefits affects New Mexico's Employment regarding recruitment and retention of educators/staff	Create an understanding of the differences between ERB and PERA and build relationships.	Legislative Chair and Co-Chair
Explain the economic impact ERB members' retiree benefits have on the New Mexico economy statewide.	Build support for protection of benefits	Legislative Chair and Co-Chair
Meet with these individuals over coffee or invite them to a UNM RA Legislative Committee meeting.	Build support for ERB.	Legislative Chair and Co-Chair
Present recognition awards when appropriate.	Build relationships.	Legislative Chair and Co-Chair
LEGISLATIVE GOAL #2: Educate UNM retiree members about the importance and value of their ERB defined benefit retirement plan, what the retire benefit constitutes, and protecting their COLA.		
TACTICS	DESIRED OUTCOME	LEAD
Update one sheets created in 2018 to distribute through the listserv and website.	Educate and grow a base and support for needed legislation.	Legislative Chair and Co-Chair
LEGISLATIVE GOAL #3: Develop documents to support needed legislation.		
TACTICS	DESIRED OUTCOME	LEAD
Keep updated on pension research and create supportive documents.	Material to present to support needed legislation.	Legislative Chair and Co-Chair
Ask ERB for evidence on the need to increase the state/employer contribution rate as shown in the BBER report on the disparity in benefits between ERB members and state employees.	Material to present to support needed legislation.	Legislative Chair and Co-Chair
LEGISLATIVE GOAL #4: Expand use of social media for communicating with members.		
TACTICS	DESIRED OUTCOME	LEAD
Get Facebook active and current.	Membership awareness of the issues and improved communication.	Legislative Chair & Co-Chair
LEGISLATIVE GOAL #5: Build support for legislation on increased state contributions from within and outside our membership		
TACTICS	DESIRED OUTCOME	LEAD
Continue communication with all UNM RA members, UNM leaders, ERB BOT, and other coalitions on situations which may necessitate input on ERB administration and legislative actions/policies or public actions.	Improved communication, relationships, trust and ability to act quickly.	Legislative Chair & Co-Chair