

VISION: Celebrating Our History, Securing Our Future

DRAFT

**STRATEGIC PLANNING RETREAT
2019-2020 ACTION PLAN**

On June 14 2019, 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. Each committee chair provided a report of the prior year's activities and the Board discussed pertinent issues and/or concerns. The Board set Committee and Board goals for 2019-2020, which are listed in the following Action Plan with related tactics.

Benefits Committee

BENEFITS GOAL #1: Improve information retirees receive at retirement.		
TACTICS	DESIRED OUTCOME	LEAD
Work with HR and Faculty Contracts to get a complete understanding of the processes followed when someone retires under ERB or TIAA-CREF.	Refinement of processes to ensure all retirees receive the information they need to access desired benefits.	M. Dougher: work with Provost Office; J. White: work with HSC Fac. Contracts
Continue to improve relationship with HR.	Greater access to information for UNM retirees.	Benefits Chair
BENEFITS GOAL #2: 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
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 Chair
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 Chair
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 Chair
BENEFITS GOAL #3: Gain lifetime insurance coverage for widows and dependents of deceased retirees.		
TACTICS	DESIRED OUTCOME	LEAD
Get insurance data from HR to determine current costs.	Identify affected individuals; build empathy for this population.	Benefits Chair
Identify cost to UNM.	Use information to convince management to cover it or a small increase to employees and retirees.	Benefits Chair
BENEFITS GOAL #4: Provide information on all UNM benefits available to retirees in one place.		
TACTICS	DESIRED OUTCOME	LEAD
Gather information on all benefits.	A comprehensive listing.	Benefits Chair
Build a webpage for either the HR or UNMRA website.	Benefits listed in a concise fashion with links for accessing the benefit.	Benefits Chair
BENEFITS GOAL #5: Good communication on post-65 insurance and networks.		
TACTICS	DESIRED OUTCOME	LEAD
Gather information from retirees on problems.	Information for HR to correct problems before open enrollment.	Benefits Chair

Program Committee

PROGRAM GOAL #1: Develop a history of events and programs.		
TACTICS	DESIRED OUTCOME	LEAD
Provide a Guest Book at each event.	Details date, time, and number of attendees and serves as a friendly way to obtain contact information.	Program Chair
Use information from guest books to build program history.	Assists in offering and designing future events, and identifying optimal timing and locations.	Program 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: Add an annual picnic to list of events.		
TACTICS	DESIRED OUTCOME	LEAD
Set date, select a location, determine costs, and any special requirements. Possibly look at the Zoo.	Meet a desire expressed by members in response to the recent survey.	J. White
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: Have a reception for legislators to educate them on the issues.		
TACTICS	DESIRED OUTCOME	LEAD
Join with other stakeholder organizations to put on the reception in October or November.	Help legislators understand the differences between ERB and PERA. Build trust with legislators.	Legislative Chair
LEGISLATIVE GOAL #2: Develop a scorecard on how legislators vote on ERB issues.		
TACTICS	DESIRED OUTCOME	LEAD
Gather information with a simple description of the issue covered by the bill and how legislators voted.	Data to use in building a scorecard.	Legislative Chair
Design the best way to present the information so voters can easily access/use it.	A tool for voters to easily use when deciding how to vote in the next election.	Legislative Chair
Determine the optimal way to communicate the scorecard without overwhelming voters.	Effective communication tool.	Legislative Chair
Develop a friend or foe list.	Easy summary tool for retirees.	Legislative Chair
LEGISLATIVE GOAL #3: Develop touchpoints with legislators.		
TACTICS	DESIRED OUTCOME	LEAD
Set up coffees, lunches, etc. with individual legislators.	Share information, build relationships.	Legislative Chair
Ask them if they have a message on retiree benefits for NM educators.	Makes it personal and to the point.	Legislative Chair
LEGISLATIVE GOAL #4: Develop 1-sheet information documents to help inform legislators.		
TACTICS	DESIRED OUTCOME	LEAD
Comparison sheet ERB vs PERA.	Legislators understand ERB has cut COLA; PERA benefits richer than ERB.	Legislative Chair
Focus on difficulty in recruiting and retaining teachers in NM.	Legislators understand the impact of cuts to ERB on keeping teachers in NM.	Legislative Chair
Point out higher education is part of ERB.	Help legislators understand higher education retirees are part of the same system as K-12 teachers.	
LEGISLATIVE GOAL #5: Give an award to specific legislators/others in recognition of their support.		
TACTICS	DESIRED OUTCOME	LEAD
Present award at the annual meeting.	Appreciative legislators.	Legislative Chair
Follow up with article in the Daily Lobo recognizing the legislator's support of higher education.	Strong communication.	Legislative Chair
Possible awardee choices Mimi Stewart, Kate O'Neil (HE Secretary).	Strong supporters of education.	Legislative Chair

Communications and Membership

COMMUNICATIONS/MEMBERSHIP GOAL #1: Redesign UNMRA website.		
TACTICS	DESIRED OUTCOME	LEAD
Work closely with UCAM.	Effective, efficient website; improve use/ease of email.	Communication and Membership Chair
Determine value of other touchpoints i.e. Instagram, Facebook, Snapchat.	Identify best ways to communicate with retirees.	Communication and Membership Chair
COMMUNICATIONS/MEMBERSHIP GOAL #2: Explore easiest way to acknowledge new members.		
TACTICS	DESIRED OUTCOME	LEAD
Develop a time-effective way to acknowledge membership and dues.	Limit impact on Treasurer’s time. Perhaps a process the administrative support person can do.	Communication and Membership Chair; Treasurer
COMMUNICATIONS/MEMBERSHIP GOAL #3: Develop ways to use UNM News Minute effectively.		
TACTICS	DESIRED OUTCOME	LEAD
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 Membership Chair
COMMUNICATIONS/MEMBERSHIP GOAL #4: Expand membership.		
TACTICS	DESIRED OUTCOME	LEAD
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 Membership 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 Membership Chair

Board Goals

BOARD GOAL #1: Build strong relationships with Faculty Senate and Staff Council presidents.		
TACTICS	DESIRED OUTCOME	LEAD
Invite Faculty Senate and Staff Council Presidents to a Board Meeting.	Share effect on current employees of retirement and benefits changes.	President
BOARD GOAL #2: Develop a scholarship program.		
TACTICS	DESIRED OUTCOME	LEAD BOARD MEMBER
Develop a budget—how much would it cost each year.	Provides data needed for decision making.	President
Survey members to see if they support the idea; would they like to donate.	Create a scholarship fund without hampering operations.	Communications Chair
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
BOARD GOAL #4: Graduated/phased retirement.		
TACTICS	DESIRED OUTCOME	LEAD
See if UNM Administration want to move forward with this project.	Limit effort of Board members to likely outcomes.	President
BOARD GOAL #5: Retiree Center.		
TACTICS	DESIRED OUTCOME	LEAD
Discuss the possibility of a Virtual Center.	Can provide the benefits of a Retiree Center with little or no cost to UNM.	President
BOARD GOAL #6: Build a statewide higher education retiree organization.		
TACTICS	DESIRED OUTCOME	LEAD
Ask Kate O'Neill (HE Secretary) to a Board meeting.	Gain knowledge and guidance for developing a Statewide organization.	President
BOARD GOAL #7: Build strong relationships with UNM administrators and other stakeholders.		
TACTICS	DESIRED OUTCOME	LEAD
Invite a guest to every Board meeting, ie Barbara Rodriguez from Provost Office.	Networking and information sharing.	President