

## Roundtable Discussion Summaries, CURAC Conference, May 2024

TABLE 1

1. What are the most important things that CURAC/ARUCC can do as a national association to assist member Retiree Associations (RAs)?			
2. If CURAC/ARUCC facilitated communication and information-sharing among retiree associations by including profiles of each RA on its website, what information would you want to see included?			
<b>Moderator:</b>	Ginette Lamontagne, MURA		
<b>Recorder:</b>	David Holmes, Carleton		
	Francois Donati	Roy Cameron	Susan Holmes
	Claude Felteau	Jim Frank	Steve Dranitsaris
	Betty Jacobs		

### Question 1

- Share best practices and ideas. Act as a hub for RAs to share ideas.
- Share information on how RAs are funded.
- CURAC can provide information that allows individual RAs to leverage comparative data to improve support from institutions.
- Share current events (speakers, lectures, courses). Take advantage of programs like Zoom.
- Share information about MOUs with parent institutions. Provide general information about how RAs keep in contact with their institutions.
- Maintain an up-to-date benefits survey, available on the CURAC website.
- Provide technology assistance – a national helpline?
- Share ideas about volunteerism opportunities with examples.
- Share ideas for RAs to serve as the institutional memory of individual universities/colleges/departments. Publicize examples.
- Highlight the conference and promote the talks and deliberations that result.
- Promote affinity partnerships.
- Keep the website current! If website is maintained by volunteers, make sure that there is succession planning to ensure continuity.

### Question 2

- Provide a template, but let each institution provide the information for the profile.
- Ensure that there is a current link to each RA website and a current email contact that is regularly monitored by the RA.
- Provide a brief history. Who is included (all employees, just academics, etc). How is a member defined?
- Provide # of active members and # of potential members (universe of all retirees)
- Details of fee structure or other arrangements for funding the RA.
- Relationship to university/college structures, e.g., pension committee, senate, senior administration, HR department.
- Any formal relationship to unions on campus.
- Reference any MOUs or other formal documents outlining the status of the RA.
- Vital that any and all information on the CURAC website is kept current through a regular review /survey of member organizations.
- Summarize the total number of organizations represented and an approximate number of total membership/potential membership.

TABLE 2

2. If CURAC/ARUCC facilitated communication and information-sharing among retiree associations by including profiles of each RA on its website, what information would you want to see included?			
3. CURAC/ARUCC strives to be actively involved in advocacy (lobbying governments, for example). What subjects should be given priority? What level of government?			
<b>Moderator:</b>	David Zitner, CURAC		
<b>Recorder:</b>	Anne Rochette, UQAM		
	Kent Percival	Richard Brown	Nora Gaskin
	Rosemary Cooke	Mohamed Elmasry	Bob Norman
	Bob Drummond		

**Question 2**

- A short description of the association that includes membership categories and criteria, specifying whether the association accepts to grant membership to retirees from other institutions.
- The description should also encompass a description of the funding model of the association.

**Question 3**

First level priority:

- Health care policies, including long term care, home care and pharmacare. Since these policies are regulated by different levels of government, all levels should be considered: federal, provincial and even municipal for some aspects.

Two other priorities are identified:

- Affordable housing,
- Accessible transportation.

Again, all levels of government should be considered.

TABLE 3

3. CURAC/ARUCC strives to be actively involved in advocacy (lobbying governments, for example). What subjects should be given priority? What level of government?			
6. What content should be prioritized on the CURAC/ARUCC website?			
<b>Moderator:</b>	Bryan Harvey, CURAC		
<b>Recorder:</b>	André Lapierre, U. Ottawa		
	Jim Boyd	Brian Beckberger	Christine Tauer Martin
	Aldyth Holmes	Diana Parker	
	Susan Birnie	Trevor Grove	

### Question 3

CURAC/ARUCC should remain active in advocacy efforts. But advocacy must be a focussed initiative based on well-founded research and established facts. For this, we must determine who will generate the necessary material and coordinate with other like-minded organizations by adding the CURAC/ARUCC perspective.

### Question 6

Two areas were identified as primary targets for advocacy: income security and health benefits. In both cases, it is essential to get a firm grasp of the policy communalities shared by RAs on these topics. Information on various types of pensions in place at RAs home institutions should be gathered and compared: defined benefit, defined contribution, defined target plans, indexation, etc. Impacts of changes to federal an/or provincial regulations on RA pensions plans must also be examined.

Similarly, detailed information on various extended health care benefits available at home institutions should be gathered to illustrate similarities and differences. An investigation into the possible impact of a national pharmacare program on RA pension plans should be part of this information gathering process. CURAC/ARUCC should spearhead the collection and dissemination of this information as well as elaborate an advocacy strategy, defining roles and responsibilities of RAs.

TABLE 4

6. What content should be prioritized on the CURAC/ARUCC website?			
7. Based on the conference program, how can (should) CURAC/ARUCC support RAs in their efforts to help their members thrive in retirement?			
<b>Moderator:</b>	Gladys We, CURAC		
<b>Recorder:</b>	Betty Bax, WLU		
	Ron Champion	Mary Hardy	
	Margaret Klatt	Shirley Irish	
	Anne Godlewska	Eileen Harvey	

### Question 6

Website content suggestions:

- LLL calendar visibility
- recordings of all our members' events if they want to share
- "Best of" from members' newsletters
- CURAC documents need review.
  - delegate expense claim forms buried
  - conference info featured readily
  - add latest updates with date
  - Conference recordings to blog
  - CURAC website as info hub
    - docs, links to resources

### Question 7

- More affinity partner offers
  - ebike discounts
  - hearing aid discounts
  - mobility aid discounts
  - see Waterloo conference website for other ideas and sponsorship ideas
- Health tips and links
  - See AROHE website for webinar ideas
  - should CURAC become an AROHE member?
  - Should we recommend AROHE membership to our members?
- Website to look at: [canadianseniorsdirectory.ca](http://canadianseniorsdirectory.ca)
- Recommend CURAC financial support to RAs to produce webinars that will be distributed nationally
- One person at our table talked about the value of using a comparison table of benefits offered across Canada, by individual RAs, to advocate to her university admin for more funding.

TABLE 5

7. Based on the conference program, how can (should) CURAC/ARUCC support RAs in their efforts to help their members thrive in retirement?			
9. <i>What strategies have worked best for your association in attracting and retaining members?</i>			
<b>Moderator:</b>	Kate Maguire, MURA		
<b>Recorder:</b>	Joost Blom, UBC Emeritus		
	Howard Armitage	Shirley Cleave	Joanne Stewart
	Arvi Rauk	Miriam Heynen	
	Clarence Swanton	Patty Hrynychak	

### Question 7

- Now that it is in-person again, the annual conference is a very positive way to bring people together and support the RAs in what they do.
- On the health pillar, in-person and online events could be put on by CURAC, either by itself or with partners. Comparison was made with RTO, which was said to put on many programs.
- RAs get requests from retirees of a different university who have moved to the RA's city and inquire about becoming affiliated with the RA. CURAC could facilitate such moves, which could be beneficial for the RA and for the individual. An example was given from U of Calgary, where 20% of the retirees do not live in Calgary. The UBC Emeritus College has provision in its terms of reference for admitting, as members, retired faculty from other institutions whose membership will further the interests of the College, and a number of members have been admitted in this category. Actual membership for a "transferring" retiree has to be left to the receiving RA, which will have its own rules about eligibility. Access to the receiving RA's programs and facilities may be straightforward to arrange.

### Question 9

- Some RAs, like the UBC Emeritus College, have automatic membership (no fee) for any retiree that qualifies; such RAs have the problem of getting their members actively involved. Most RAs do not have automatic membership so the challenge is to attract members. One RA at the table had a membership capture of about 10%. Some, McGill for example, offer retirement support programming partly to attract interest from potential members before they retire.
- Calgary mentioned that their RA had just been extended to include non-academic staff, after being faculty-only, but noted that getting a list of eligible staff retirees from the university was proving a challenge.
- The suggestion was made that the name of the RA may affect how potential members view it. "Retiree," to some, suggests a cessation of activity, whereas "emeritus," for instance, suggests continuing connection with the university or college. The latter, if it can be used, strikes a more positive note, and so may other names.

TABLE 6

8. What are the most important things that your Retiree Association can do to assist retirees and those about to retire?			
9. What strategies have worked best for your association in attracting and retaining members?			
<b>Moderator:</b>	Christine Wagner, UWRA		
<b>Recorder:</b>	Marg Burnett, UWRA		
	Sue Fraser	Larry Shuh	David Peirson
	Normand Murray	Kevin Harrigan	
	Janet Sealey	Susan Nesrallah	

### Question 8

- Retirement planning sessions – hopefully working with the University administration and HR to plan and deliver these sessions covering a broad range of topics to promote a successful transition to retirement. Could be multiple sessions grouped by the number of years to retirement (i.e., 5 years to retirement; 10 years to retirement etc) to encourage advance planning
- Connect with large unions to let them know what benefits are for retirees and encourage advocating to improve retirement benefits
- Create a pension plan update delivered by retiree associations (RA's) to support those who have already retired
- Plan and deliver social activities, pub nights, speakers, outings, info sessions, etc.
- Help with inquiries on benefits/pensions, CURAC info etc and any issues/challenges in these areas. Be an advocate for problem solving
- Ensure unions do not forget about retirees – improve the visibility of retirees and education around benefits
- Communication
- Representation on all staff/faculty groups so that RAs are at the table when issues around retirees are being discussed.

### Question 9

- Challenge to communicate with new retirees. Once they retire, many lose their University email. Challenge to connect with retirees before they retire.
- Carleton – HR sends the names and contact info of recent retirees to the president of RA.
- A yearly event for all retirees every calendar year – RA association has a table at the event with handouts and staff to advertise and share info about RA
- Send a proactive form to retirees a few months before they retire
- Free first event for new retirees
- Contact unions – have them put an article in their newsletter on the benefits of RA membership. Note this newsletter will connect only with current employees – will not be able to reach retirees with this method.
- Send a package of information to employees prior to retirement with contact info, examples of activities, etc.
- Retention ideas – offer reasonable lifetime membership to encourage longer involvement
- Bring-a-friend activity to expose retiree to an activity / benefits of membership
- If a retiree joins RA within 6 months of retirement, University pays membership.
- Have current members reach out to newly retired staff/faculty that they know from their previous department
- Offer a broad range of activities to interest a broad range of people.

TABLE 7

4. <i>What is the best mix of in-person, virtual and hybrid events?</i>			
5. <i>When communicating with members, what is the best mix of newsletters, webinars, website postings, and email?</i>			
<b>Moderator:</b>	Lynn Judge, UWRA		
<b>Recorder:</b>	David Taylor, UWRA		
	Joe Allen	Ed Jewinski	Shibu Pal
	Jean Andrey	Bev Stefureak	
	Frank Ferrie	Lowell Ewert	

#### Question 4

- Hybrid events are problematic—hard to get them to work.
- For speakers, in-person only works best, is most popular.
- Technology for hybrid events can be problematic, frustrates in-person attendees.
- Virtual useful for speakers you wouldn't be able to get in person.
- Hybrid may be useful for business meetings, but not for "events."
- Even for business meetings need to be careful/intentional to ensure on-line participants are given equal opportunity to participate.
- Get more out of in-person meetings because of social contact in addition to official program.
- Ranking: in-person, virtual when problems doing an event in-person, hybrid has too many problems—maybe O.K. for meetings but not likely for events.

#### Question 5

- "Regular point of contact" through e-mail.
- Also nice to have printed newsletter—higher impact and reinforces connection with organization.
- General view is that e-mail is a necessity. In part, should be used to provide links to information on web site.
- Not much experience with webinars, don't seem to be a priority.
- Summary: need to focus on e-mail, but use it to provide links to web site; good to complement with printed newsletter when possible—higher impact and reinforcement of connection with organization,

5. <i>When communicating with members, what is the best mix of newsletters, webinars, website postings, and email?</i>			
1. What are the most important things that CURAC/ARUCC can do as a national association to assist member Retiree Associations (RAs)?			
<b>Moderator:</b>	Fred Fletcher, YURA		
<b>Recorder:</b>	Walter Archer, CURAC		
	Ian Fraser	Gwen Graper	Julie Nichols
	Gerry Cross	Frances Atkinson	
	Doris Tom	Mary Ann Vaughan	

### Question 5

Most use some combination of these, depending on circumstances. For example, SFU has a large membership, so has three different lists for different purposes, and uses them sparingly.

The two groups at York have a large overlap, so the worry is about sending too much email. They hope to scale back to regular monthly updates so people will anticipate those and actually read them. They include “remembrances” rather than obits.

The Waterloo RA sends a twice-yearly paper magazine to all retirees – at the University’s expense! They also use their free zoom account for webinars.

We need to use some combination (varying with the circumstances) of “push” and “pull” technologies. If we rely entirely on “pull” (the obvious example being our websites) we have built it but they will not come. We need to “push” something in front of them, such as an email or newsletter (paper or electronic). This push can include links that will “pull” them to the website, where we can put lots of different things. One member of our group remarked that there is a big surge of traffic on their website right after their monthly newsletter goes out, but that tails off to almost nothing just before the next newsletter. However, if we get too “pushy” (e.g., our emails are too frequent or too long) people will stop paying attention to them.

### Question 1

- Lobby governments or other agencies, e.g., to establish a better way of accessing dental plan
- Liaise with other agencies that lobby for retirees
- Help RAs to learn about how other RAs are structured, etc.
- Maybe take on one topic at a time
- Maybe get lists from the unions
- Learn about how RAs have created relationships, including with HR and with higher administration
- Perhaps build on the benefits survey recently published by CURAC
- Use a spreadsheet in order to get a better idea of practices elsewhere
- Share information e.g., benefits - use a spreadsheet in order to get a better idea of practices elsewhere
- Create a format for each RA to use to report benefits (e.g., Carleton has a good one)
- Advocacy – learn how to involve the RAs in lobbying their MPs etc.



TABLE 9

8. <i>What are the most important things that your Retiree Association can do to assist retirees and those about to retire?</i>			
10. <i>Based on what you've heard and seen at the conference, how can your Retiree Association support you in your efforts to thrive?</i>			
<b>Moderator:</b>	Catherine Bolger, UWRA		
<b>Recorder:</b>	Barb Moffatt, UWRA		
	Pat Skinner	Ed Leach	
	Maggie Heeney	John Lennox	
	Mary Joy Aitken	Janet Kaufman	

### Question 8

- Communicate programs offered by the Retiree Association (RA) to folks before they are about to retire. Since only HR has access to the names and contact info of these people, this will require collaboration between the groups.
- Could HR be approached to provide an evident link to the Retiree Association on their web site, and more importantly, rejuvenate the in-person “About to Retire” seminar they used to run. Perhaps there are RA members who would be willing to help with this event.
- If an obvious hyperlink to the RA website could be established on the HR webpage, then the RA could reach a wider audience to advertise their events and conferences.
- Once the RA has established the size of the conference, they wish to manage they can open the registration up to a wider audience by advertising more broadly: asking members to advertise it on their own networks, bring a colleague, radio spots etc.
- It would be helpful if the RA website could provide information on the UW resources that retirees will have access to. For example, one person at our table had recently received a message indicating that she would lose access to all Microsoft products on June 6. This was unanticipated.

### Question 10

- The three topics of the greatest interest were help with socialization, exercise and learning new things.
- It would be ideal if the RA could inspire socialization events that incorporate exercise and learning new things (e.g., lawn bowling)
- Could the RA reach out to members for suggestions of topics of their current interest or new interests? Find out what hobbies they are doing to get ideas for future events.
- See if the current attendees could each inspire a new member or participant in the association. “Bring a friend” to the next event. (I just made this up myself now)

Note regarding question on in-person, virtual or hybrid events – if the meeting was to be virtual or if there was a virtual showing – could we organize local satellite sites so members could view the presentation together and perhaps socialize/discuss afterwards? This needn't be a conference but could be watching thought-provoking documentaries or sharing adventures.

TABLE 10

10. Based on what you've heard and seen at the conference, how can your Retiree Association support you in your efforts to thrive?			
4. What is the best mix of in-person, virtual and hybrid events?			
<b>Moderator:</b>	Rose Vogt, UWRA		
<b>Recorder:</b>	Judi Jewinski, UWRA		
	Sandra Hirst	Saundra van Ark	
	Dawn Cheng	Murray Zink	
	Frank Millerd		

#### Question 4

It's the quality of the presenter that ensures the success of a Zoom presentation. Hybrid is okay as long as virtual presentations include handouts. It is impossible to guarantee interference-free sessions. OWL is helpful, but not for large groups.

COVID made us realize how much we appreciate in-person events, especially at conferences. These need to offer a variety of activities and topics (this year's CURAC conference is an excellent example). But AGMs do NOT need to be in person events.

Here are the top two recommendations:

- It is essential to have IT support for all presentations, virtual or live.
- Organizers need to remember that when people pay to attend, they would rather not watch too much on the screen. Again, this year's CURAC offered the right balance. To get a star presenter available only virtually should be an exception, not a rule, at a paying event.

#### Question 10

Here are the three main recommendations in order of importance:

- It is essential to maintain a visible presence of retirees on campus. They need to be represented in decisions that impact retirees. Remind leadership how much retirees contribute to the institution. Make the university or college president a leader in recognizing the value of retirees.
- Organize HELPFUL pre-retirement info in seminars and workshops available long before the retirement happens. Help mentor new retirees by establishing connections from past to present (Pathways to Transition). Offer different opportunities for remaining active on campus.
- RAs should facilitate social occasions for people to interact. Offer sporting opportunities such as walking groups, exercise classes, off-campus if on-campus parking is prohibitive. Advocate for facilitated membership in fitness activities on campus.

**Participants of the CURAC/ARUCC 2024 National Conference engaged in roundtable discussions the morning of Friday, May 24.**

**The conference, themed *Thriving in Retirement*, was hosted by the University of Waterloo Retirees Association (UWRA), May 22-24, 2024.**