

*University of Waterloo Retirees' Association*  
*Member Survey Report 2019-2020*

Authors

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May 11, 2020

## *Summary*

Between December 2019 and January 2020 an online survey asked UWRA members to evaluate the programming provided by the UWRA. In addition to evaluating programming, suggestions for future programming were solicited from respondents to inform new services and events. The survey found that, on average, most of the programming offered by the UWRA performed well (above 4.0 on a scale from 1 to 5). This translates to most programming reflecting a notion of *Keep up the Good Work*, or *Possible Overkill*. Notable exceptions were the general meeting, food quality of the fall reception, and the value for money of the spring luncheon which performed below standards, reflecting notions of *Concentrate Here*. These exceptions will need to be the focus of future improvements. In addition, possible suggestions for new programming included bus tours and trips, socials, benefits, and information nights. This leaves the board with three questions to ask now:

1. How do we address the programs and aspects that are in need of future improvements?
2. What new programming suggested is feasible to provide to members?
3. How do we plan to continue to provide excellence to our members and address the few areas of concern that did not meet our high standards?

By answering these three questions the UWRA can adapt to the needs and wants of its members while maintaining the service it is already providing.

## *Introduction*

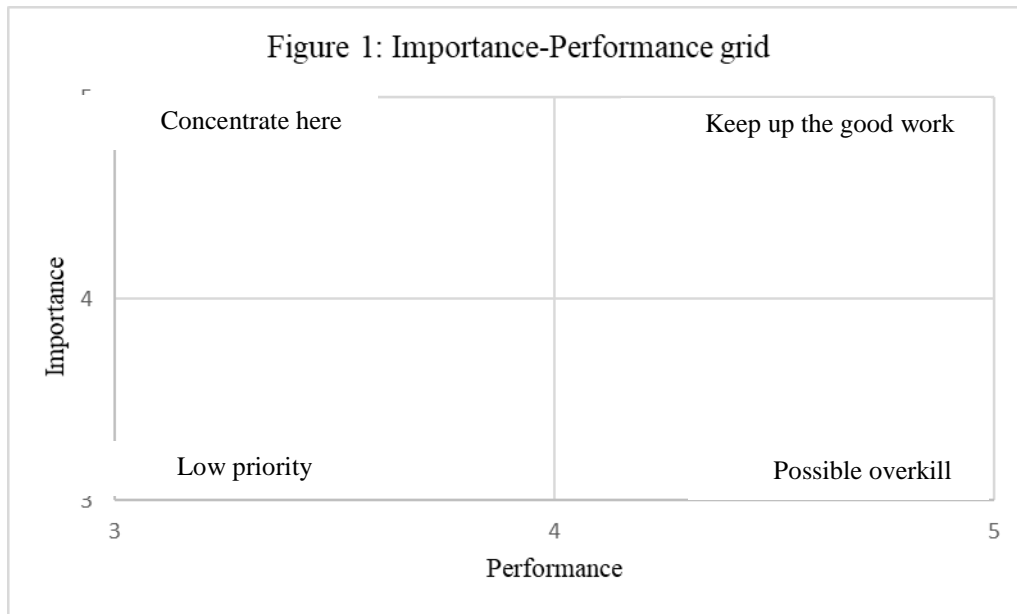
Evaluating programs offered by an organization is important for self-reflection, a deeper understanding of issues, and a grounding to inform future decision making (Vedung, 2017). Assessing how stakeholders feel will help enlighten future decisions. In this case, the stakeholders are members of the University of Waterloo Retirees' Association (UWRA) and this evaluation is focused on assessing both the importance and the performance of the programming offered by the UWRA while gathering suggestions for future programming. The importance score of a service indicates the relevance of the service to the respondent. The performance score indicates the level of achievement of the service. It is important to measure both attributes so that the high importance services are given the most emphasis.

In line with the aims and objectives of the UWRA, this report will show how the members feel about the programming offered, while also showing future opportunities for program offerings by the University of Waterloo Retirees' Association (UWRA).

To allow for an easy interpretation and representation of the members' feelings around the programming offered, the Importance-Performance Analysis (IPA) approach was adopted. First utilized by Martilla and James (1977) and applied to a diverse range of contexts in relation to tourism and hospitality, the IPA provides an evaluation of programming that potentially places each program's scores within one of four groups in a graph (Figure 1). These four groups are:

1. *Keep up the good work*: Importance and performance measures are both above standards set by the organization demonstrating the organization meeting an important want or need.

2. *Concentrate here*: Importance for the stakeholder is high however; the performance of the aspect or program is below the organization’s standards, demonstrating a place to focus on in the future.
3. *Low priority*: Both importance and performance measures are low, suggesting that the program has low importance and is performing poorly.
4. *Possible overkill*: Importance measures are low for stakeholders; however the performance is above the standards of the organization. Typically, this shows which programs can be de-emphasized.



### *Purpose*

This summary report provides two sections of results. The first gives descriptive data on each question asked. The second gives averages of all questions asked in addition to applying the Importance-Performance Analysis (IPA) technique. By utilizing importance-performance measures in addition to open-ended questions, this report provides feedback that can be operationalized for future planning of events, and programming within the UWRA.

### *Methods*

The UWRA survey subcommittee, listed on the title page, worked with the researchers, graduate student Alex Silver and Professor Steven Mock, to develop the survey instrument, including each of the questions. Subsequently, the survey was offered online to all UWRA members from December 1, 2019 to January 15, 2020. The survey used a mixture of questions, including rankings of attributes on a scale from 1 to 5, and some open-ended questions. The entirety of the survey questions and possible answers can be found in Appendix 1. The survey had 71 respondents out of a total membership of 700. Therefore, the response rate is about 10%, which is low.

The survey looked to evaluate programming offered by the UWRA. For the reception and luncheons, 8 specific attributes were assessed for both importance and performance: 1) In General; 2) Convenient Location – Easy Accessibility; 3) Efficient Reservation; 4) Friendliness of Staff; 5) High Quality Food; 6) High Quality Lecture; 7) Ability to Socialize with Other Members; and, 8) Value for Money. The values given for each attribute enables the UWRA Board to fine tune various aspects of each program. In addition to looking at the luncheons

separately, their attendees were combined to examine the importance and performance of all aspects across luncheons. Other programming including general meetings, credit union seminars and the WATTimes newsletter were evaluated for importance and performance in general only. Open-ended questions were also provided soliciting suggestions for future programming and events.

To analyse the data, descriptives of all answers were calculated. Coding of open-ended questions was done to determine re-occurring statements and group them allowing frequency of each answer/code to be presented. The 5-point scale questions were all about the importance or performance of different programming or aspects of programming provided by the UWRA. By gathering both importance and performance on this 5-point scale an Importance/Performance analysis (IPA) was done utilizing the importance and performance means of attendees. The variables were plotted on a mean performance by mean importance grid with gridlines placed at 4.0 reflecting *important* and *good* performance. The selection of 4.0 is done to reflect the high standards, and high service quality of UWRA programming and the selection of mean over median was done because it is easily derived, which are both in line with previous works that utilized IPA (Wade & Eagles, 2003).

## Results

### Section 1: Descriptives of Each Survey Question

The average year of retirement was roughly 2010, and the average year of joining the UWRA was roughly 2009 (Table 1). The largest group of respondents attended the Fall reception (42), with fewer attendees, according to responses, going to the spring luncheon (17), followed by the fall luncheon (15), then the education credit union seminar (9), and then the St. Jacobs Theatre and Block 3 Tour (7) (Table 2).

Table 1: Average Year of Retirement and Joining UWRA

Question	<i>N</i>	<i>M</i>	<i>SD</i>
What year did you retire?	69	2009.55	7.11
In what year did you join the UWRA?	67	2008.73	8.53

Table 2: Total Attendance at UWRA Events or Activities in the Last 18 Months

Event/Activity	<i>N</i>
Fall Reception	42
Spring Luncheon	17
Fall Luncheon	15
St. Jacobs Theatre and Block 3 Tour	7
Education Credit Union Seminar	9

### Fall Reception in 2019

The 2019 fall reception took place on September 18<sup>th</sup> with Neil Aitchison, the guest speaker; who talked about the Drayton Story. A total of 42 respondents attended the fall reception. All performance averages for the fall reception were high, above 3.9, with averages ranging from 3.94 to 4.31 (Table 3). All importance averages for the fall reception were also high, with

averages for attendees ranging from 3.88 to 4.58, for non-attendees ranging from 3.37 to 4.06, and the combined average ranging from 3.65 to 4.22 (Table 4).

Table 3 reveals that the highest performance average score was that for the friendliness of staff. One must assume that this means all those who worked at the reception, including greeters, food staff, and board members.

Table 4 gives importance scores from respondents who did not attend the fall reception. As one might expect, all the importance scores of non-attendees, except one, are lower than the corresponding averages for those who did attend. The one oddity was that the importance of a high quality lecture was scored at 4.09 by both those who attended and those who did not attend. This may indicate that those who did not attend felt that the quality of lecture was important, and it was some other concern, other than the quality of lecture, that kept them from attending.

Table 3: Average Performance of the Fall Reception

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
In General	37	4.22	0.75
Convenient Location – Easy Accessibility	36	4.31	0.67
Efficient Reservation	34	4.09	0.75
Friendliness of Staff	36	4.53	0.61
High Quality Food	35	3.94	0.68
High Quality Lecture	36	4.19	0.79
Ability to Socialize with Other Members	36	4.11	0.79
Value for Money	36	4.14	0.72



Table 4: Average Importance of the Fall Reception

Attributes		<i>N</i>	<i>M</i>	<i>SD</i>
In General	Attended	37	3.89	0.94
	Did Not Attend	32	3.37	0.66
	Total	69	3.65	0.85
Convenient Location – Easy Accessibility	Attended	36	4.31	0.82
	Did Not Attend	33	4.03	0.88
	Total	69	4.17	0.86
Efficient Reservation	Attended	34	3.88	0.73
	Did Not Attend	32	3.69	0.86
	Total	66	3.79	0.79
Friendliness of Staff	Attended	36	4.36	0.76
	Did Not Attend	31	4.06	0.63
	Total	67	4.22	0.71
High Quality Food	Attended	36	4.11	0.75
	Did Not Attend	31	3.94	0.85
	Total	67	4.03	0.71
High Quality Lecture	Attended	36	4.06	0.86
	Did Not Attend	31	4.06	0.67
	Total	67	4.06	0.77
Ability to Socialize with Other Members	Attended	36	4.58	0.60
	Did Not Attend	32	3.81	0.69
	Total	68	4.22	0.75
Value for Money	Attended	36	4.06	0.83
	Did Not Attend	32	3.94	0.76
	Total	62	4.00	0.79

### *Spring Luncheon in 2019*

The 2019 Spring Luncheon took place on April 25<sup>th</sup> with Professor Robert Gillham talking about the history of the Department of Earth and Environmental Science, and Roly Webster talking about the history and future of the Department of Athletics. A total of 17 respondents attended the spring luncheon. All performance averages for the spring luncheon were above 3.8, with averages ranging from 3.88 to 4.56 (Table 5). All importance averages for the spring luncheon were above 3.2 with averages for attendees ranging from 4.06 to 4.31, for

non-attendees ranging from 3.29 to 4.00, and the combined averages ranging from 3.51 to 4.04. The importance of having a spring luncheon every year averaged 3.5 (Table 6).

Table 5 reveals that all the performance ratings were above 4.0, but for one, the value for money at 3.88. Interestingly, the performance for price was 4.15, which is higher than value for money. Since value for money typically means each person ranks the value of the program they received compared to the price. Therefore, the price was acceptable, but some minor concern lowered the value below 4.0. The single highest performance scored was that for the friendliness friendless of staff, which presumably means all those who worked at the reception, including greeters, food staff, and board members. Table 6 reveals that the highest importance ranking for a single attribute was 4.48, Friendliness of Staff. It is important to note this high ranking in the planning of future such events.

Table 6 also reveals that those who did not attend the spring luncheon provided a lower importance score for all attributes than those who did attend. This is to be expected. Interestingly the importance score for having a spring luncheon each year is 3.52, which is only moderately important. The lowest importance score of non-attendees was 3.29, given to the question; In General. Such wording does not give specific guidance, but does show a relative lower level of importance given to the spring luncheon.

Table 5: Average Performance of the Spring Luncheon

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
In General	16	4.31	0.60
Convenient Location – Easy Accessibility	16	4.25	0.58
Efficient Reservation	16	4.38	0.62
Friendliness of Staff	16	4.56	0.63
High Quality Food	16	4.31	0.70

High Quality Lecture	16	4.06	0.77
Ability to Socialize with Other Members	16	4.06	0.68
Value for Money	16	3.88	0.62
Price	13	4.15	0.80

Table 6: Average Importance of the Spring Luncheon

Attributes		<i>N</i>	<i>M</i>	<i>SD</i>
In General	Attended	16	4.06	0.44
	Did Not Attend	41	3.29	0.93
	Total	57	3.51	0.89
Convenient Location – Easy Accessibility	Attended	16	4.31	0.60
	Did Not Attend	41	3.88	0.81
	Total	57	4.00	0.78
Efficient Reservation	Attended	16	4.19	0.54
	Did Not Attend	40	3.68	0.57
	Total	56	3.82	0.61
Friendliness of Staff	Attended	16	4.38	0.50
	Did Not Attend	39	3.90	0.72
	Total	55	4.04	0.69
High Quality Food	Attended	16	4.13	0.81
	Did Not Attend	40	4.00	0.75
	Total	56	4.04	0.76
High Quality Lecture	Attended	16	4.31	0.60
	Did Not Attend	41	3.85	0.82
	Total	57	3.98	0.79
Ability to Socialize with Other Members	Attended	16	4.31	0.60
	Did Not Attend	41	3.90	0.77
	Total	57	4.02	0.74
Value for Money	Attended	16	4.06	0.57
	Did Not Attend	42	3.79	0.75
	Total	58	3.86	0.71
Price	Attended	16	4.06	0.44
	Did Not Attend	42	3.86	0.68
	Total	58	3.91	0.63
Having a Spring Luncheon every year?		66	3.52	0.85

*Fall Luncheon in 2018*

The 2018 fall luncheon took place on October 19<sup>th</sup> with Professor Daniel Younger talking about the history of the Department of Combinatorics and Optimization, and Professor Paul Eagles who talked about the history of the Department of Recreation and Leisure Studies, as guest speakers. A total of 15 respondents attended the fall reception. All performance averages for the fall luncheon were above 4.1, with averages ranging from 4.15 to 4.62 (Table 7). All importance averages for the fall luncheon were also above 3.8 with averages for attendees ranging from 3.85 to 4.31, for non-attendees ranging from 3.38 to 3.95, and the combined average ranging from 3.52 to 4.00. The importance of having a fall luncheon every year averaged 3.5 (Table 8).

Table 7 reveals that performance of all aspects of the fall reception was ranked highly. The highest ranked single attribute was the Friendliness of Staff, presumably meaning all those who worked at the reception, including greeters, food staff, and board members.

Table 8 shows that the highest importance rating for an attribute was 4.38, the ability to socialize with other attendees. It is important to note the importance of this attribute when planning future such events. Table 8 also reveals that in all cases those who did attend the fall luncheon gave a higher importance ranking to all attributes than those who did not attend. This is to be expected.

Table 7: Average Performance of the Fall Luncheon

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
In General	12	4.42	0.67
Convenient Location – Easy Accessibility	13	4.38	0.51
Efficient Reservation	12	4.58	0.67

Friendliness of Staff	13	4.62	0.65
High Quality Food	13	4.31	0.63
High Quality Lecture	13	4.23	0.73
Ability to Socialize with Other Members	13	4.31	0.48
Value for Money	13	4.23	0.83
Price	13	4.15	0.80

Table 8: Average Importance of the Fall Luncheon

Attributes		<i>N</i>	<i>M</i>	<i>SD</i>
In General	Attended	13	4.00	0.71
	Did Not Attend	45	3.38	0.72
	Total	58	3.52	0.75
Convenient Location – Easy Accessibility	Attended	13	4.31	0.48
	Did Not Attend	46	3.85	0.79
	Total	59	3.95	0.75
Efficient Reservation	Attended	12	4.08	0.52
	Did Not Attend	45	3.71	0.63
	Total	57	3.79	0.62
Friendliness of Staff	Attended	13	4.23	0.60
	Did Not Attend	45	3.87	0.73
	Total	58	3.95	0.71
High Quality Food	Attended	13	3.85	0.56
	Did Not Attend	44	3.95	0.83
	Total	57	3.93	0.78
High Quality Lecture	Attended	13	4.23	0.60
	Did Not Attend	46	3.93	0.77
	Total	58	4.00	0.74
Ability to Socialize with Other Members	Attended	13	4.38	0.51
	Did Not Attend	45	3.82	0.78
	Total	57	3.95	0.76
Value for Money	Attended	13	4.00	0.58
	Did Not Attend	44	3.82	0.72
	Total	57	3.86	0.69
Price	Attended	13	4.08	0.49
	Did Not Attend	45	3.82	0.72
	Total	58	3.88	0.68
Having a Fall Luncheon every year?		65	3.51	0.83

*Miscellaneous Programming*

The importance for education credit union seminars were 4.13 for attendees, 3.12 for non-attendees, and 3.24 for the average of all respondents. The performance of the education credit union seminar was 4.25 (Table 9). The importance of the St. Jacob's theatre and Block 3 tour was 3.13 on average (Table 10). The importance and performance of the WATTimes newsletter were both above 4.0, with 4.39 for importance and 4.32 for performance (Table 11). The importance and performance scores of the UWRA general meeting were both roughly 4.0 with a 4.00 for importance, and 3.94 for performance (Table 12). The importance of the UWRA participating in the management of the University of Waterloo pension was 4.74, which is very high and is the highest importance score found in the survey. The importance of the University of Waterloo and the University of Waterloo Retirees' Association hosting a recognition event each year for the retirees of the previous 12-month period was 3.89, which is modestly important on the scale from 1 to 5 (Table 13).

Table 9: Average Importance and Performance of the Education Credit Union Seminar

Attributes		<i>N</i>	<i>M</i>	<i>SD</i>
Importance of the Education Credit Union Seminar	Attended	8	4.13	0.64
	Did Not Attend	58	3.12	0.84
	Total	66	3.24	0.88
Performance of the Education Credit Union Seminar		8	4.25	0.46

Table 10: Average Importance of the St. Jacobs Theatre and Block 3 Tour

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
Importance of the St. Jacobs Theatre and Block 3 Tour	64	3.13	0.77

Table 11: Average Importance and Performance of the WATTimes Newsletter

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
Importance of the WATTimes Newsletter	71	4.39	0.71
Performance of the WATTimes Newsletter	68	4.32	0.72

Table 12: Average Importance and Performance of the UWRA General Meeting

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
Importance of the annual UWRA general meeting	70	4.00	0.70
Performance of the annual UWRA general meeting	53	3.94	0.80

Table 13: Average Importance of Miscellaneous UWRA Programming

Attributes	<i>N</i>	<i>M</i>	<i>SD</i>
Importance of the UWRA participating in the management of the University of Waterloo pension?	70	4.74	0.56
The University of Waterloo piloted a Retiree Recognition Reception over the past 2 years. In your opinion, how important is it that the University of Waterloo and the University of Waterloo Retirees' Association host a recognition event each year for the retirees of the previous 12-month period?	70	3.89	0.97

### *Future Programming Suggestions*

The majority of responses toward suggestions for future programming were left blank. Suggestions for future social events, that were given, noted that bus tours and trips with the most suggestions (14), followed by socials (3), then talks and lectures (2), and lastly fundraisers (1) (Table 14). Out of suggestions for future services bus trips, benefits and arrangements, and info nights and meetings had the most suggestions (3), followed by lectures (2), then fundraiser (1), and online renewal system (1) (Table 15).

Table 14: Open-Coded Suggestions for “What social events would you like the UWRA to host for members?”

Open-Coded Suggestion	<i>N</i>
Bus Tours and Trips	14
Socials	3
Talks and Lectures	2
Fundraisers	1

Table 15: Open-Coded Suggestions for “Please list any services that are not currently provided by UWRA but should be provided by UWRA in the future.”

Open-Coded Suggestion	<i>N</i>
Bus Tours and Trips	3
Benefits and Arrangements	3
Info Nights and Meetings	3
Lectures	2
Fundraiser	1
Online Renewal System	1



## *Section 2: Importance/Performance Analysis of each Program*

For the purposes of this report, IPA grids were created, in order to create 4 quadrants that can be used to guide interpretation of the findings. There is debate in the literature regarding where to place the central point of the grid, and for this analysis the central point is placed at the point where both importance and performance are scored at 4.

### *Fall Reception in 2019*

The importance/performance (IP) calculations for the Fall Reception suggest that all aspects, excluding the quality of food, and the ability to socialize with other members, are positive, meaning they are performing above or equal to their importance. Therefore, only quality of food and ability to socialize show negative scores, meaning that expectations were not reached (Table 16). These two aspects can be considered for improvement in future events. Importantly the IP score for value for money is positive, signalling that those who attend the fall reception are happy with a program for which no charge was assessed. It is important to note that the food at the fall reception was only finger food, which is not usually considered to be high quality food.

Figure 2 shows that all aspects, except quality of food, had a performance score above 4.0, suggesting a positive experience within all of those aspects. The only aspect that falls below 4.0 regarding performance and within the *concentrate here* quadrant of the grid is quality of food, suggesting that the quality of the food at the fall reception is important to members and expectations were not fulfilled or exceeded. The two aspects of the fall reception in general and efficiency of reservation fell below the 4.0 mark regarding importance and within the *possible overkill* quadrant. All other aspects of the fall reception were above the 4.0 mark regarding

importance and performance falling within the *keep up the good work* quadrant. No aspects are a considered a low priority.

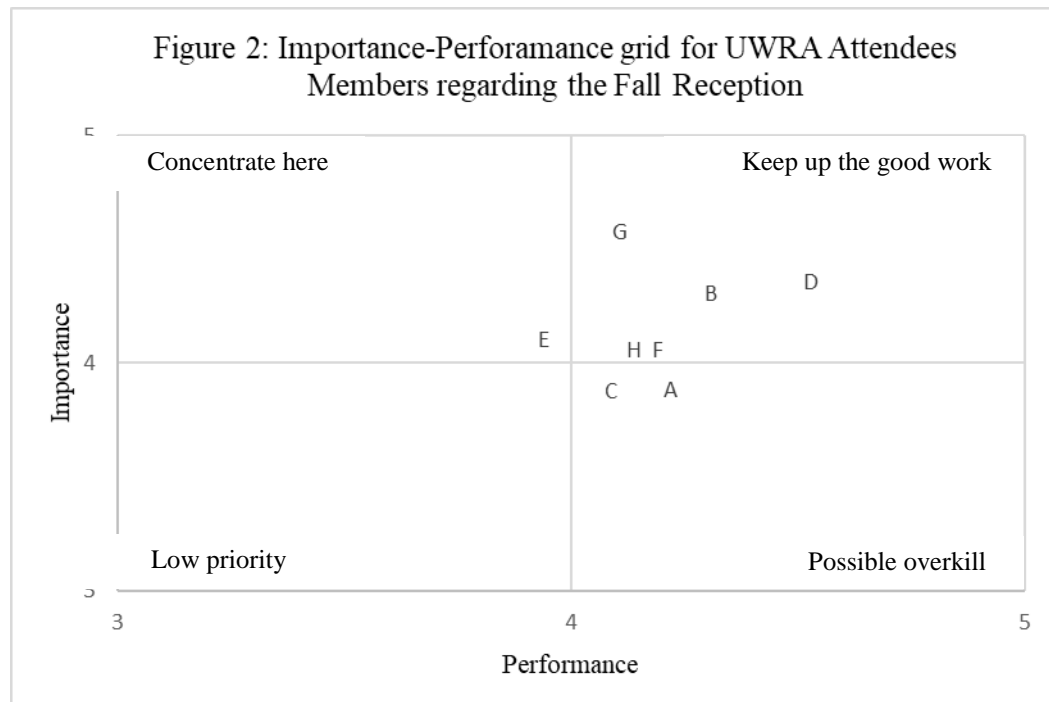


Table 16: Fall Reception Mean Importance and Performance Ratings

Code	Variable	Mean Importance	Mean Performance	Difference
A	In General	3.89	4.22	0.33
B	Convenient Location – Easy Accessibility	4.31	4.31	0.00
C	Efficient Reservation	3.88	4.09	0.21
D	Friendliness of Staff	4.36	4.53	0.17
E	High Quality Food	4.11	3.94	-0.17
F	High Quality Lecture	4.06	4.19	0.13
G	Ability to Socialize with Other Members	4.58	4.11	-0.47
H	Value for Money	4.06	4.14	0.08

### *Spring Luncheon in 2019*

The importance/performance (IP) calculations for the Spring Luncheon show that the Spring Luncheon in general, efficient reservation, friendliness of staff, high quality food, high quality lecture, value for money, and price are positive, meaning they are performing above their importance. Therefore, the remaining aspects, convenient location – easy accessibility, ability to socialize with other members, and high quality food, show negative scores, meaning that expectations were not reached (Table 17). These three aspects can be considered for improvement in future events.

Figure 3 shows that all attributes, except value for money, have a performance value greater than 4.0, suggesting a positive experience within all of those aspects. The only aspect to fall below the 4 mark regarding performance and within the *concentrate here* quadrant of the grid is value for money suggesting that value for money is important to UWRA member attendees and expectations were not fulfilled or exceeded. This is an important finding since the spring reception has a cost to provide a meal and a lecture. All other aspects had an average importance and performance above 4.0 meaning it fell within the *keep up the good work* quadrant. No aspects fell in the *low priority* and the *possible overkill* quadrants.

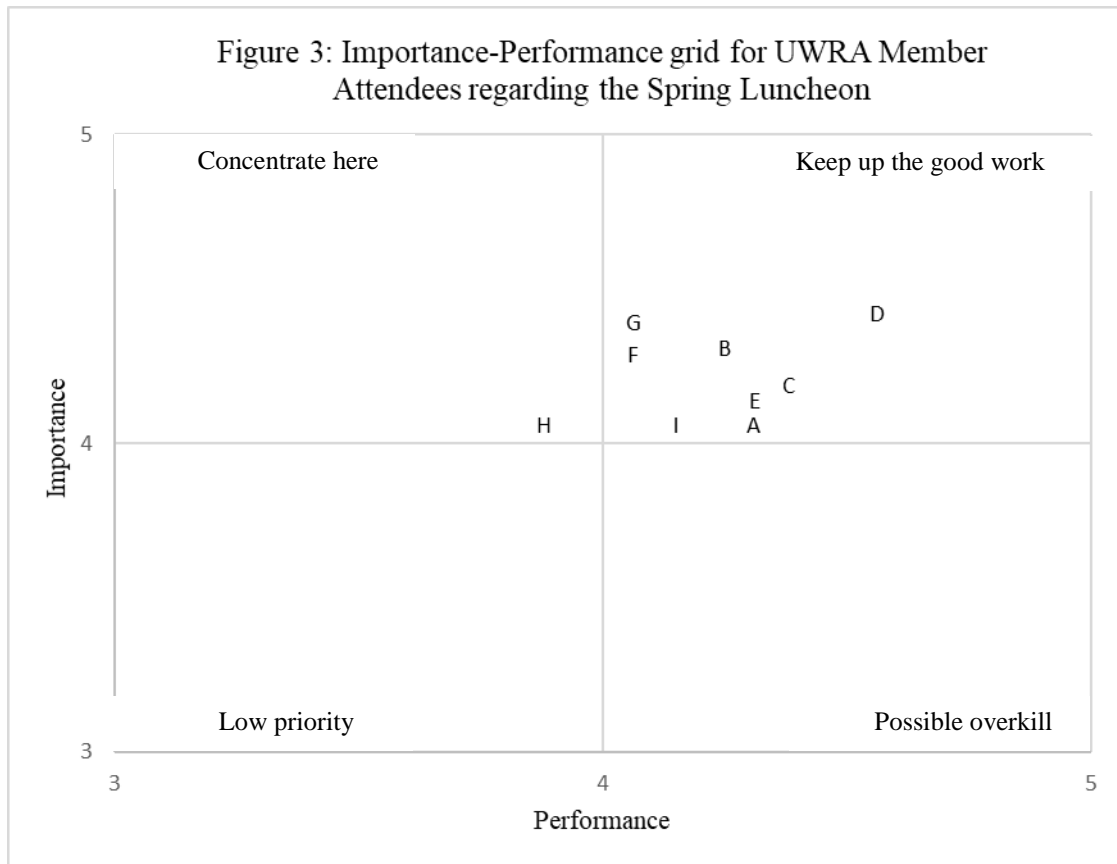


Table 17: Spring Luncheon Mean Importance and Performance Ratings

Code	Variable	Mean Importance	Mean Performance	Difference
A	In General	4.06	4.31	0.25
B	Convenient Location – Easy Accessibility	4.31	4.25	-0.06
C	Efficient Reservation	4.19	4.38	0.19
D	Friendliness of Staff	4.38	4.56	0.18
E	High Quality Food	4.13	4.31	0.18
F	High Quality Lecture	4.31	4.06	-0.25
G	Ability to Socialize with Other Members	4.31	4.06	-0.25
H	Value for Money	4.06	3.88	-0.18
I	Price	4.06	4.15	0.09

### *Fall Luncheon in 2018*

The importance/performance (IP) calculations for the Fall Luncheon suggest that all aspects, excluding ability to socialize with other members are positive or even, meaning they are performing above or equal to their importance. Therefore, only the ability to socialize with other members was assigned a negative score, meaning that expectations were not reached (Table 18). Ability to socialize with other members can be considered for improvement in future events. This is difficult to manage as there are 3 aspects to the luncheons, a social gathering, a luncheon, and a lecture packed into a short time period.

Figure 4 shows that all aspects perform above the high standards UWRA has (4.0), either falling within or in-between the *keep up the good work* or *possible overkill* quadrants. Notably, the only aspect to fall below the 4.0 mark regarding importance and within the *possible overkill* quadrant was high quality food. The two aspects of the Fall Luncheon in general and value for money had exactly a 4.0 rating regarding importance falling in-between the *keep up the good work* and *possible overkill* quadrants. All other aspects had an average of above 4.0 regarding both importance and performance falling within the *keep up the good work* quadrant. No aspects fell within the *low priority* or *concentrate here* quadrants.

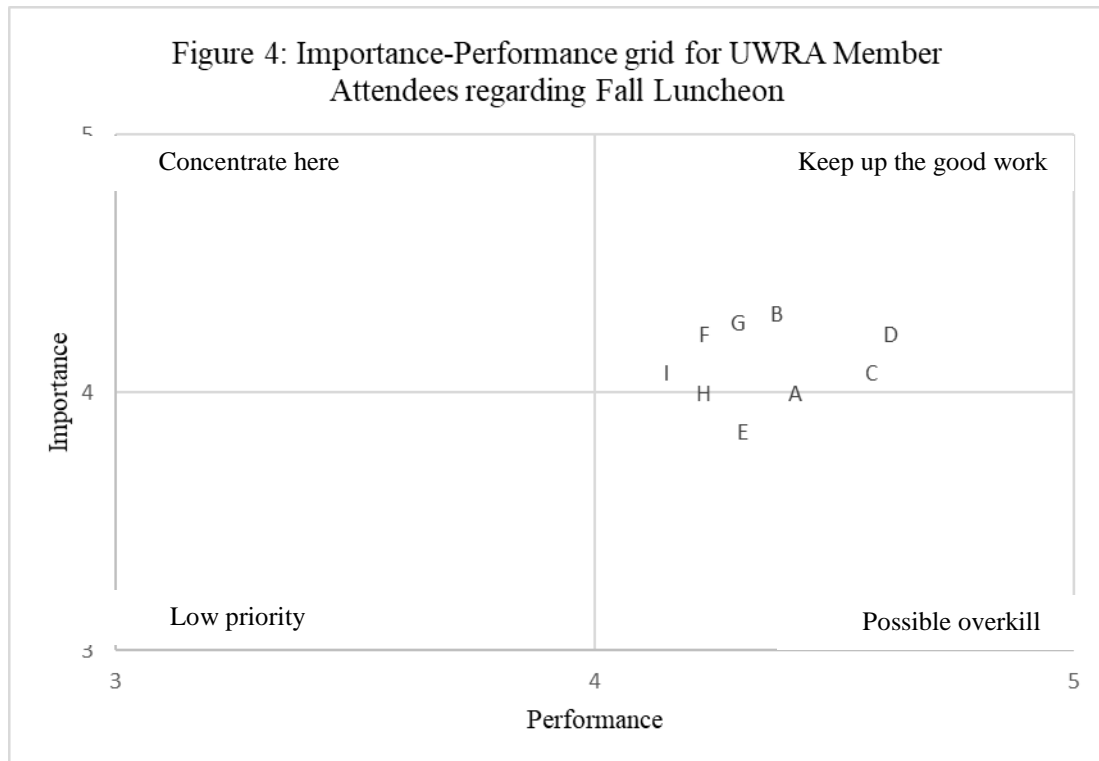


Table 18: Fall Luncheon Mean Importance and Performance Ratings

Code	Variable	Mean Importance	Mean Performance	Difference
A	In General	4.00	4.42	0.42
B	Convenient Location – Easy Accessibility	4.31	4.38	0.07
C	Efficient Reservation	4.08	4.58	0.50
D	Friendliness of Staff	4.23	4.62	0.39
E	High Quality Food	3.85	4.31	0.46
F	High Quality Lecture	4.23	4.23	0.00
G	Ability to Socialize with Other Members	4.38	4.31	-0.07
H	Value for Money	4.00	4.23	0.23
I	Price	4.08	4.15	0.07

**Combined Luncheon Scores**

The importance/performance (IP) calculations for the combined averages of both luncheons (Spring 2019 and Fall 2018) suggest that all aspects, excluding high quality lecture and ability to socialize with other members, are positive or even, meaning they are performing

above or equal to importance. Therefore, only the aspects high quality lecture and ability to socialize with other members show negative scores, meaning that expectations were not reached (Table 19). Ability to socialize with other members and the high quality lectures can be considered for improvements in future luncheons in general.

Figure 5 shows that all aspects perform above the high standard the UWRA has (4.0) either falling within the *keep up the good work* quadrant or between the *keep up the good work* and *possible overkill* quadrants. Notably, the only aspect to fall between the two quadrants with exactly a 4.0 in terms of importance was high quality food. All other aspects had an average of above 4.0 regarding both importance and performance falling within the *keep up the good work* quadrant. No aspects fell within the *low priority* or *concentrate here* quadrants.

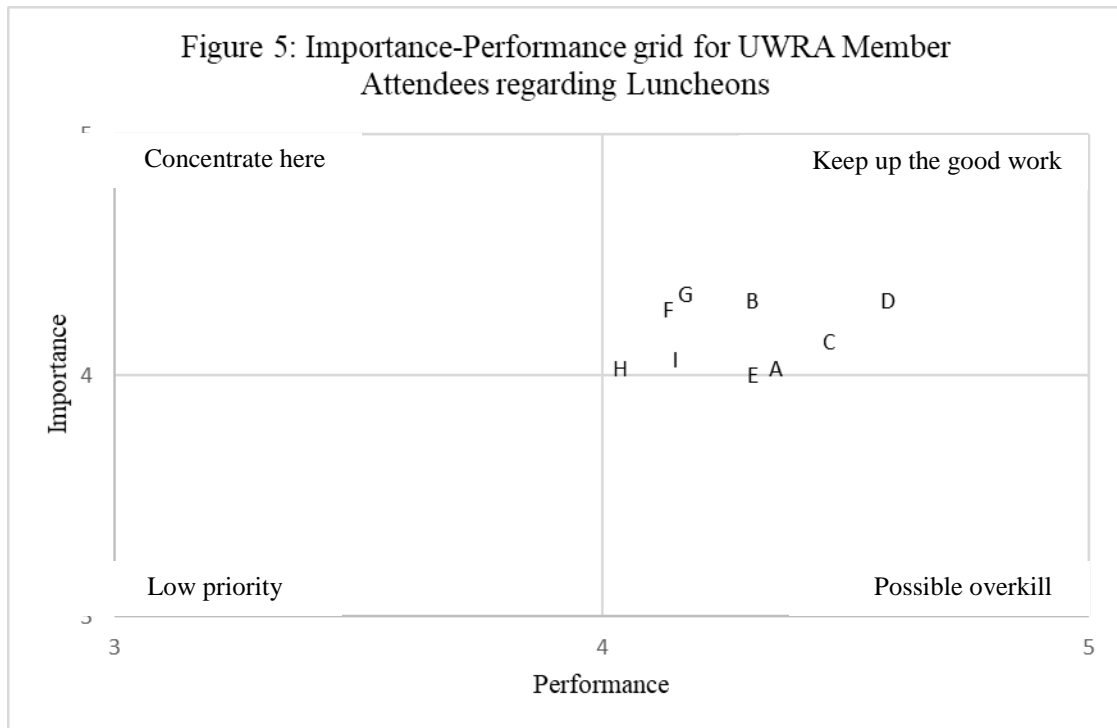


Table 19: Combined Luncheons Mean Importance and Performance Ratings

Code	Variable	<i>Mean Importance</i>	<i>Mean Performance</i>	<i>Difference</i>
A	In General	4.03	4.36	0.33
B	Convenient Location – Easy Accessibility	4.31	4.31	0.00
C	Efficient Reservation	4.14	4.47	0.33
D	Friendliness of Staff	4.31	4.59	0.28
E	High Quality Food	4.00	4.31	0.31
F	High Quality Lecture	4.27	4.14	-0.14
G	Ability to Socialize with Other Members	4.34	4.17	-0.17
H	Value for Money	4.03	4.04	0.01
I	Price	4.07	4.15	0.08

### *Miscellaneous UWRA Programming*

The importance/performance (IP) calculations for the miscellaneous UWRA programming suggest that the educational credit union seminar is positive, meaning it is performing above their importance. Therefore, the WATTimes newsletter and the general meetings show negative scores, meaning that expectations were not reached (Table 20). These two aspects can be considered for improvement in future events.

Figure 6 shows that the credit union seminars and the WATTimes newsletter have an average importance and performance above 4.0 falling within the *keep up the good work* quadrant. The general meeting has an average performance below 4.0 and an average performance of 4.0 falling in-between the *concentrate here* and *low priority* quadrants.



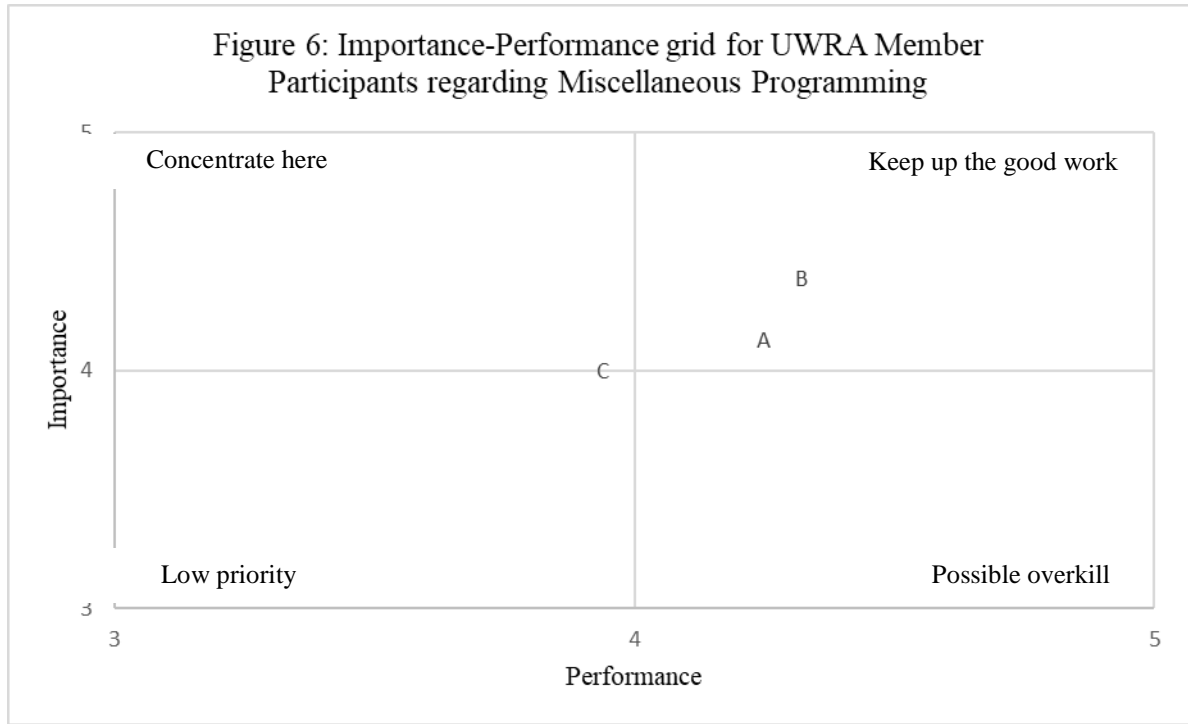


Table 20: Miscellaneous UWRA Programming Mean Importance and Performance Ratings

Code	Variable	Mean Importance	Mean Performance	Difference
A	Credit Union	4.13	4.25	0.12
B	WATTimes Newsletter	4.39	4.32	-0.07
C	General Meeting	4.00	3.94	-0.06

## *Conclusions*

When observing all survey responses, the results show that overall the programming provided by the UWRA is meeting or exceeding expectations and the members find the programming to be highly valuable. As shown within the results, virtually all the importance and performance scores were above the *neutral* or *ok* mid-point suggesting a positive association with all the programming provided by the UWRA. However, one aspect of the programming provided by the UWRA, high quality food at the Fall Luncheon, fell within the *possible overkill* quadrant of the IPA grid suggesting that lots of effort is being put into these programs and aspects however, the members/attendees see them as less important. In addition, some aspects including high quality food at the Fall Reception, value for money at the Spring Luncheon, and the general meeting fell within the *concentrate here* or between the *concentrate here* and *low priority* quadrants. This suggests that these aspects can be considered for future improvements to meet or exceed the expectations of the UWRA members. All other programs and aspects evaluated fell within the *keep up the good work* quadrant or between the *keep up the good work* and *possible overkill* quadrants suggesting that most aspects are meeting or exceeding the high standards set. When looking at the IP differences, most programs and aspects had a positive score however those with a negative score, quality of food and ability to socialize with other members at the Fall reception, convenient location, high quality lecture, ability to socialize with other members and value for money at the Spring Luncheon, ability to socialize with other members at the Fall luncheon, the WATTimes newsletter, and the general meeting, can be considered for future improvements to address this negative difference. Notably, the ability to socialize with other members had a negative difference for all events suggesting a need to better

facilitate socialization which is in line with some suggestions put forward within the open-ended question.

As illuminated within the open-ended questions, some possible events and programs were suggested to help better serve the members of the UWRA (Table 14; Table 15). Regarding, creating new social events, the most requested event was taking bus tours or trips with suggestions including going to sports games, craft shows, museums (i.e. The ROM), theatres, and wine tours. The next most suggested social event was casual socials, like a Christmas or Holiday party, or an open mic night, where members can come together in a more casual way than the current reception and luncheons with their associated lectures. The remaining suggestions included new talks/lecture (i.e. Maintaining health), and fundraisers. Regarding new services suggested, the most requested were bus tours (as suggested above), info nights and meetings like organizing meetings to reconnect your field or nights to learn more about offerings, and benefits including dental, vision, and funeral arrangements. The remaining suggestions were lectures, fundraisers, and an implementation of an online renewal system for membership. There is some overlap between the answers to the two questions however, this helps to provide the scope of wants members have for future programming.

In conclusion, the results suggest that the UWRA is providing programming that is meeting or exceeding the vast majority of the members' expectations. The main takeaway is that the programming provided need little change; an excellent finding. The remaining questions to ask now are:

1. How do we address the programs and aspects that are in need of future improvements?
2. What new programming suggested is feasible to provide to members?

3. How do we plan to continue to provide excellence to our members?

By answering these three questions the UWRA can adapt to the needs and wants of its members while maintaining the service it is already providing.

## *References*

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**Appendix**

Appendix 1: Survey Questions and Possible Responses

Question	Responses
Please check off the UWRA programs and services that you have attended or used in the past 18 months:	Fall Reception Spring Luncheon Fall Luncheon St. Jacobs Theatre and Block 3 Tour Educational Credit Union Seminar
What other UWRA services are important to you but not listed above?	Open-Ended
Importance of the fall reception-in general?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of the fall reception-in general?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Reception-Importance of convenient location - easy accessibility?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of convenient location - easy accessibility?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Reception-Importance of efficient reservation?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of efficient reservation?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Reception-Importance of friendliness of staff?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of friendliness of staff?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent

Fall Reception-Importance of high quality food?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of high quality food?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Reception-Importance of high quality lecture?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of high quality lecture?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Reception-Importance of ability to socialize with other members?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of ability to socialize with other members?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Reception-Importance of value for money?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Reception-Performance of value for money?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Importance of the spring luncheon and lecture-in general?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Performance of the spring luncheon and lecture-in general?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of convenient location - easy accessibility?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important

Spring Luncheon-Performance of convenient location - easy accessibility?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of efficient reservation?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of efficient reservation?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of friendliness of staff?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of friendliness of staff?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of high quality food?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of high quality food?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of high quality lecture?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of high quality lecture?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of ability to socialize with other members?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of ability to socialize with other members?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent



Spring Luncheon-Importance of value for money?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of value for money?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Spring Luncheon-Importance of price?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Spring Luncheon-Performance of price?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
How important is it that the UWRA have a Spring Luncheon each year?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Importance of the fall luncheon and lecture-in general?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Performance of the fall luncheon and lecture-in general?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Luncheon-Importance of convenient Location - easy accessibility?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of convenient Location - easy accessibility?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Luncheon-Importance of efficient reservation?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of efficient reservation?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent

Fall Luncheon-Importance of friendliness of staff?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of friendliness of staff?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Importance of high quality food?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of high quality food?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Luncheon-Importance of high quality lecture?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of high quality lecture?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Luncheon-Importance of ability to socialize with other members?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of ability to socialize with other members?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Luncheon-Importance of value for money?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Fall Luncheon-Performance of value for money?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Fall Luncheon-Importance of price?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important

Fall Luncheon-Performance of price?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
How important is it that the UWRA has a Fall Luncheon each year?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Importance of the UWRA participating in the management of the University of Waterloo pension?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Importance of annual UWRA general meeting?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Performance of the annual UWRA general meeting?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Importance of the WATTimes newsletter?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Performance of the WATTimes newsletter?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
Importance of the St. Jacobs Theatre and Block 3 tour?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Importance of the education credit union seminars?	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important
Performance of the education credit union seminar?	1 = Very Poor 2 = Poor 3 = OK 4 = Good 5 = Excellent
The University of Waterloo piloted a Retiree Recognition Reception over the past 2 years. In your opinion, how important is it that the University of Waterloo and the University of Waterloo Retirees' Association host a recognition event each year for the retirees of the previous 12-	1 = Very Unimportant 2 = Unimportant 3 = Neutral 4 = Important 5 = Very Important

month period?	
What social events would you like the UWRA to host for members?	Open-Ended
In what year did you retire?	Open-Ended
In what year did you join the UWRA?	Open-Ended
Please list any services that are not currently provided by UWRA but should be provided by UWRA in the future.	Open-Ended