



RETIREMENT ASSOCIATION

UWRA Strategic Framework 2020-2025

Mission

The purpose of the University of Wisconsin–Madison Retirement Association (UWRA) is to promote the interests, health, and welfare of its members through a diverse program of activities and information, to facilitate their support of the University and the surrounding community through volunteer initiatives, and to maintain liaison with relevant University and community organizations.

Building on a Strong Foundation

UWRA has established a strong foundation, with a high level of retirees as members, over 40 offerings and 24 breakfasts per year, and over 36% of members actively participating. From this position of strength, we are developing a strategic framework to guide our work over the next few years, with the aim of sustaining and enhancing our ability to best serve our members. We believe our most critical metric of success is ***member satisfaction***, which drives everything else.

Strategic Priorities

LISTEN – To understand our members’ desires

ENGAGE – Deliver high quality offerings that compel members to engage

CONNECT – Communicate with members and expand our reach to potential members

PARTNER – To enhance benefits to UWRA’s members

LEAD – For strength and sustainability

Indicators of Success

- Member satisfaction
- Greater member diversity including age, race/ethnicity, employment category, and socio-economic status
- Financial stability
- Number of retirees that are members
- Number of members that are engaged

Strategic Priorities and Actions

LISTEN – To understand our members’ desires

- Understand members’ desires through surveys and regular feedback.
- Seek to learn about interests of potential members.
- Learn about services offered by our Big Ten colleagues.

ENGAGE – Deliver high quality offerings that compel members to engage

- Provide high quality offerings that best meet the needs of our members.
- Ensure programming addresses interests of a broad membership and provide an inclusive environment.
- Consider new offerings such as: affinity groups and/or more social opportunities, more programs that address current issues, such as legislative, social, environmental, based on member interest, and/or new services, such as life insurance, lobbying, etc.
- Consider the web as a vehicle for engagement and some offerings.
- Consider default membership for first year post retirement.

CONNECT – Communicate with members and expand our reach to potential members

- Enhance UWRA’s visibility, brand, and awareness of the value we provide.
- Design communication systems that keep our members informed and aware of offerings and the value of belonging.
- Evolve approaches to use technology, including the web and social media.
- Ensure we are reaching broad demographics: position, race/ethnicity, age, shift workers, economic diversity, outside UW, etc.
- Develop systems to better connect with people when they first retire.

PARTNER – To enhance benefits to UWRA’s members

- Explore UW partnerships, such as UW Foundation, Alumni Association, Division of Continuing Studies, Division of Equity and Diversity, Office of Human Resources, and/or community organizations.
- Explore potential partnerships with campus units for student projects/internships.
- Continue to build connections with Big Ten colleagues to learn best practices and collaborate.

LEAD – For strength and sustainability

- Continue to provide strong leadership with a system for leadership succession.
- Move to financing UWRA’s staffing, versus all volunteer.
- Explore potential budget and fees changes to ensure financial strength, flexibility and sustainability.
- Review our status as a 501(c)4 and consider 501(c)3, and take appropriate action.
- Evolve organizational structure and committees to best serve our members and organizational goals.
- Keep the organization current with technology and other means for serving our members.