**Retirees Association of Queen’s (RAQ) : Strategic Planning Group**

**Final Report to Membership: April 2021**

**Summary**

This section includes a brief statement of the recommendations made to and accepted by RAQ Council. The body of the report includes a digest of the evidence considered by the Planning Group in formulating the recommendations.

Some of the principal factors influencing our recommendations were: the change in RAQ membership from predominantly male academic staff members to an increasing proportion of non-academic staff members, primarily female; the substantial number of RAQ members who live sufficiently far from Kingston to preclude their participation in Kingston-based activities; the need to support activities important to the membership.

Consequently, the Planning Group has made a number of recommendations that have been accepted by Council.

***Most Important RAQ Activities.*** RAQ will continue to support benefits advocacy; pension advocacy; the newsletter; the web site; and deals and discounts.

***Lifelong Learning.*** RAQ will continue to pursue the issue of lifelong learning both broadly in consultation with other interested groups and specifically in terms of the continuation and development of the Lunchtime Speaker Series and Monday Morning Forum including delivery by Zoom.

***Collaboration with Other Campus Groups.*** Discussions will continue with QUFA, USW, CUPE and other campus unions with a view to developing these relationships further.

***Advancement.***  Discussions will continue with Advancement with a view to determining whether there is any mutual benefit in a closer relationship between RAQ and Advancement.

***Nomination Procedures.*** When preparing nominations for Council positions, the Nominations Committee will canvass the membership at large for nominations and self-nominations. As far as possible at least one position on Council will be filled by a member of RAQ who lives outside the Kingston area.

**Support for Activities.** RAQ will distinguish between core activities - those that RAQ is committed to maintain, and which are the responsibility of a member of Council - and supplementary activities - those for which RAQ would provide a framework for support but which it is not committed to support permanently. Core activities include: pension advocacy; benefits advocacy; Newsletter; web site; deals and discounts; the Lunchtime Speaker Series – including Zoom; and the Monday Morning Forum. All activities, whether core or supplementary, would have to meet consistent criteria including: must be consistent with mission and objectives; must be of interest to a sufficient number of members; must be, at least, revenue neutral; and must have a sponsor prepared to take responsibility for organisation.

We must emphasis that these recommendations are a basis for what must be an evolution in the way that RAQ develops to serve its members.

**History**

This document is a report to the membership on the outcome of the work of the Strategic Planning Group. The members of the group included Doug Boyd, John Holmes, Diane Kelly, and Alistair MacLean (Chair). In November 2020, we circulated a questionnaire to the members of RAQ. Based on the analysis of the questionnaire responses and on data already in RAQ’s files, the Group made a number of recommendations, subsequently approved by Council, regarding the future operation of RAQ.

We have previously reported to the membership in two documents: S*ummary of Questionnaire Responses* and *Digest of Questionnaire Results*. These documents are available at https://www.queensu.ca/retirees/about/strategic-planning.

In total, 322 members responded to the questionnaire giving a response rate of 35.5%, about average for surveys. Not everyone responded to every question so the response rates for some questions total less than 322. Some questions allowed people to give multiple responses so that results for those questions total more than 322 and percentages total more than 100.

**Changing Composition of RAQ**

As of January 2021, RAQ had 946 members, 43% of whom joined in 2020. Twenty-eight percent live outside of Kingston, 12% living more than 50 km from Kingston. Based on the Questionnaire responses, 42% of members are former non-academic staff members, 52% former academic staff; the remainder either are spouses or occupied other, sometimes joint, positions.

The change in composition of the membership over time is striking.

* ***Non-academic staff membership has grown substantially.*** Among respondents to the questionnaire, 55% joining for the first time in 2020 were non-academic staff members, only 34% were academic staff.
* ***The gender balance is changing.*** Of respondents joining this year, 57% are women and 43% men; among respondents who have been members for more than five years the comparable figures are 27% women and 73% men.

It appears that:

* RAQ membership is changing from predominantly male academic staff members to a group with an increasing proportion of non-academic staff members, primarily female.
* There is a substantial number of RAQ members who live sufficiently far from Kingston to preclude their participation in Kingston-based activities.

These factors have had an important influence upon the recommendations that we have made to Council to assist RAQ in developing the support that it provides to its members. These recommendations are intended to provide a basis for a continuing evolution of RAQ’s activities.

**Most Important RAQ Activities**

The figure below shows respondents’ ratings of current RAQ activities. The number of respondents selecting “some importance” and “very important” were combined and expressed as a percentage of those responding.

There are some differences in the level of support for these activities from groups within the membership. Differences of less than 10% are not reported.

* ***Non-academic and academic staff.*** Non-academic staff more frequently endorse deals and discounts (difference of 19%), the web site (13%), and volunteer activities (13%). Academic staff endorse the Monday Morning Forum (12%) more frequently.
* ***Gender.*** Women ascribe more importance to all these activities, in particular deals and discounts (22%), social events / excursions (16%), the Lunchtime Speaker Series (12%), the Newsletter (10%), web site (18%), student bursaries (12%), and volunteer activities (11%).
* ***Age.*** The most consistent pattern in these results is a reduction of rating of importance with increasing age. This is evident in pension advocacy, deals and discounts, social events / excursions, Lunchtime Speaker Series, Newsletter, web site, and volunteer activities. In contrast, there is a slight increase in ratings with age for the Monday Morning Forum.
* ***Length of membership.*** The most prevalent pattern is for activities to be more highly rated by current rather than new members of RAQ. The only exception to this is deals and discounts that are more highly rated by new members than by those who have been members for more than five years. Generally, there is little difference between the ratings of respondents who have been members for 1 to 5 years and those who have been members for more than 5 years. Exceptions to this are deals and discounts (29%), the Lunchtime Speaker Series (14%), and volunteer activities (18%) which are more highly rated by members of 1 to 5 years standing.

***Benefits advocacy; pension advocacy; the newsletter; the web site; and deals and discounts are supported by more than 50% of those responding. Council has agreed with the recommendation of the Planning Group that these activities continue to be supported by RAQ.***

**Lifelong Learning**

The figure below combines data showing the number of respondents endorsing new activities together with the frequency of attendance at current activities.

Lifelong learning, public lectures, and health and wellness are the three requested activities most frequently endorsed. Apart from the Annual General Meeting, the most frequently endorsed current activity is the Lunchtime Speaker Series.

Also relevant is the fact that many retirees are involved with a wide range of social or community groups. In Kingston, one of the most popular of these is the Kingston Seniors Centre that supports an extensive variety of programmes. There are also a number of other groups with similar interests including Queen’s Institute of Lifelong Learning, the Faculty of Education, and Enrichment Studies.

With respect to the issue of where RAQ should commit future resources, it must be questioned to what extent RAQ should try to replicate services that are already present in the community. A number of respondents advised that RAQ should focus on what it does best. Respondents strongly (94%) support the development of partnerships with community groups.

RAQ is well positioned to contribute to aspects of lifelong learning as indicated by the continuing success of the Lunchtime Speaker Series and the development of Zoom presentations which also goes some way to address the concerns of members living outside the Kingston area. RAQ also has access to health professionals from many specialties. That is, RAQ already has a firm basis of activity and opportunity on which to build contributions to lifelong learning and public education.

Some discussions have already taken place with the relevant groups but more work requires to be done. As well as the general interest in lifelong learning, there is a specific interest in the dissemination of health-related information.

***Council has agreed that RAQ will continue to pursue the issue of lifelong learning both broadly in consultation with other interested groups and specifically in terms of the continuation and development of the Lunchtime Speaker Series and Monday Morning Forum including delivery by Zoom.***

**Collaboration With Other Campus Groups**

There was strong support (97%) from respondents to the questionnaire in favour of RAQ collaborating with employee groups at Queen’s with respect to advocating for pensions and benefits.

Preliminary contacts with some of the groups indicate interest in collaboration with RAQ on issues of mutual interest. From RAQ’s perspective, these might include:

* Negotiations relating to pensions and benefits.
* Encouraging retirees to become members of RAQ.
* Providing information to pending retirees to help the transition to retirement.

Collaboration on these issues is at a very early stage but a cordial basis for further work has been established.

***Council has agreed that discussions should continue with QUFA, USW, CUPE and other campus unions with a view to developing these relationships further.***

**Advancement**

As the Planning Group was beginning its deliberations, Advancement approached us to see whether there was any mutual benefit to a closer relationship with RAQ. We have now had several informal interchanges with them. There is a clear understanding that any development must be of a nature that provides a positive outcome for both RAQ and Advancement.

Some of the possibilities that have been tabled so far include: (a) the possibility when the pandemic is over of a social event supported by Advancement; (b) the possibility of Advancement including retirees in off-campus events; and (c) a possible association between retirees and off-campus alumni/ae associations.

***Council has approved the continuation of discussions to determine whether there is possible mutual benefit in developing a closer relationship between RAQ and Advancement.***

**Nomination Procedures**

In the last year, RAQ has almost doubled in the size of its membership to nearly 1,000 people. Forty-three percent of the current membership have joined in the last year. A major challenge for RAQ is to show that it is welcoming and responsive to all its members.

Part of demonstrating that inclusiveness is to offer new, as well as longer serving, members an opportunity to take part in the organisation.

Twelve percent of RAQ members live more that 50 km from Kingston. In addition, there are members within the Kingston area who because of disability or other reasons are unable to attend RAQ activities. The inclusion of at least one Council member living distant from Kingston would help to ensure that the interests of those members who have more difficulty in attending events based in Kingston are represented.

***Council has agreed that: (1) when preparing nominations for Council positions, the Nominations Committee canvass the membership at large for nominations and self-nominations; (2) at least one position on Council should as far as possible be filled by a member of RAQ who lives outside the Kingston area.***

**Support for RAQ Activities**

As was indicated above, benefits advocacy, pension advocacy, Newsletter, web site, and deals and discounts are endorsed by 50% or more of respondents and Council has committed to their continued support. In addition, the Lunchtime Speaker Series and the Monday Morning Forum have long histories of regular attendance and are consistent with Council’s previous decision to explore the issue of lifelong learning.

Together with RAQ’s continuing commitment to regular consultation with the senior University administrators, these might be regarded as core activities. ***Council has agreed to designate core activities as those that RAQ is committed to maintain, and which are the responsibility of a member of Council. Core activities include:***

* ***Pension advocacy.***
* ***Benefits advocacy.***
* ***Newsletter.***
* ***Web site.***
* ***Deals and discounts.***
* ***Lunchtime Speaker Series – including Zoom.***
* ***Monday Morning Forum.***

The figure on the next page shows the percentage of respondents endorsing eleven possible future activities. Other activities were also suggested by respondents but are not included here because data for the degree of support they might have are not available.

Many of the activities are available from other sources. A number of respondents suggested that there was little value in RAQ trying to replicate activities that are already available to members from other sources, and that RAQ should focus its attention on its unique strengths. While it may be possible to arrange collaboration with other organisations, a simple initial solution would be for RAQ to provide links to other web sites on its own web page.

Nevertheless, there may be some activities for which a particular Queen’s interest is present; for example, a book club with a more specifically academic orientation or the wish of individuals for social opportunities with a Queen’s focus.

The top ranked four potential new activities are lifelong learning, public lectures, health and wellness, and small group travel. RAQ is already committed to explore possibilities for lifelong learning, which may also encompass public lectures, health and wellness, the Monday Morning Forum, and the Lunchtime Lecture Series.

Support for a new activity would depend on someone taking responsibility for its organisation and promotion. This could be an existing Council member or RAQ could solicit the membership to see if someone was prepared to take on this responsibility. Thus, RAQ could gauge the real enthusiasm for any new activity. Designating such activities as supplementary would allow RAQ flexibility in how many activities to support. RAQ’s role would be to provide a framework of support for the organiser of any supplementary activity.

***Consequently, Council has agreed to designate as supplementary those activities for which RAQ would provide a framework for support but which RAQ is not committed to support permanently.***

***All activities, whether core or supplementary, would have to meet consistent criteria including:***

* ***Must be consistent with mission and objectives.***
* ***Must be of interest to a sufficient number of members.***
* ***Must be, at least, revenue neutral.***
* ***Must have a sponsor prepared to take responsibility for organisation.***

**Acknowledgements**

As Chair of the Planning Group, it is a pleasure to record my thanks to Cheryl Descent for her support, to the members of Council for their patience and advice, and to the other members of the Group for their suggestions, productive discussion, and good humour.

I welcome any questions or comment, which should be addressed to me at macleana@queensu.ca. Alistair W. MacLean