



Strategic Plan for Senior College Centre

November 2018

Introduction

This is a plan for 2018 through to 2023 for the Senior College Centre, the branch of Senior College that provides services and organizes activities for all College members. The mandate of the Strategic Plan Committee appointed by the Centre's Board of Management extends only to the services and activities of the Centre. Members of the Committee are Derek Allen, Harold Atwood, Patricia Bellamy, Peter Russell (Chair) and Kent Weaver.

In establishing the Strategic Plan Committee, the Board of Management is carrying out its responsibility under the College's constitution to "Develop the strategic direction and plan for the Centre...." The Board considered it important to do this strategic planning following the merging of the Academic Retiree Centre (now the Senior College Centre) with Senior College, and the decision to make membership in Senior College automatic for all University of Toronto retired faculty and librarians. Since only a small fraction of retirees opt to pay the fee required to become a Fellow of the College and participate actively in the College's academic program, it is the non-academic services and activities provided by the Centre that will likely be of most interest to the many Members of Senior College who are not Fellows.

The purposes of the Centre are basically threefold: (i) to provide services of interest to academic retirees at the University of Toronto, (ii) to strengthen and maintain connections between the Centre and the University's academic retiree community, and (iii) to make the College's scholarly resources available to groups in the community outside the University.

The Plan

I Aims and Resources

1) Senior College Centre should continue and improve its existing services and activities, and to the extent that resources permit, introduce some new services and activities. A priority over the next few years should be making all retired faculty and librarians aware of the Centre and increasing their participation in its activities.

2) The plan outlined below can be carried out with the College's existing salaried staff (i.e. one full-time administrator) and an increase in volunteer support. A principal source of volunteer support will be committees of the Board of Management. Up to now the Board of Management has confined its role to giving policy direction to the Centre. A policy of the Centre, going forward, is that committees established by the Board will be given responsibility for carrying out some of the Centre's activities. These committees may include members of Senior College who are not members of the Board.

3) The consultation phase in developing this plan indicated how important it is for the Board of Management to keep in touch with the retiree community it is designed to serve. One of the University's leading science scholars said that until the consultation he had never heard of the Senior College Centre and urged a strengthening of the Centre's links with the University. One concrete suggestion was that the Centre assist the Dean of Graduate Studies by reviving RALUT's practice of maintaining a roster of retirees who maintain an active full membership in the School of Graduate Studies, and who are willing to chair PhD orals. Another suggestion was that the Centre provide information about possible tax benefits for retirees in donating books and papers to the University. The Board of Management should consider these suggestions and keep itself open to other suggestions about making the Centre relevant and useful for retired faculty and librarians on all three campuses.

II Maintaining and Enhancing Existing Services and Activities

A. The Centre's Premises

1) The Centre's physical space will remain, for the time being, suite 412 at 256 McCaul Street. It will continue to be open and accessible to members of the College, 9am to 4pm, five days a week. During those hours the College's Administrator and/or volunteers will be at the Centre to answer phone calls and welcome visitors.

2) The policy for use of the committee room is that it is used only by College and Board committees, unless a group with some relation to College interests applies to use it. Such applications will be submitted to the Chair and Co-chair of the Board of Management.

3) The main users of the Centre's lounge space are the officers of the College and College members attending committee meetings, academic program events, or involved in organizing College business. The Executive Room (former RALUT office) will continue to provide a place for College officers to work.

4) The original plan for the Centre was that it would be a place where retirees would drop in and socialize. That is a prime function served by university retiree centres at other academic institutions. The location at 256 McCaul has meant that the Centre does not serve as a drop-in

centre. In the consultation phase of developing this plan, one retiree made it clear that a location south of College is just not on her campus. Many, many other retirees have voted with their feet not to visit the Centre. The Board of Management should remain on the lookout for a different on-campus location on the St. George campus for the Centre, which would remain contingent on approvals from the University, based on competing demands for space on the St. George campus.

5) To increase the attractiveness of the Centre as a place for academic retirees to drop in, a more sustained effort will be made to have publications written by College members in retirement on shelves in the lounge, and to have information about the College and seniors' services available in the lounge. The Board of Management will establish a House Committee to assist the Administrator in getting members to donate books and copies of other publications, in collecting informative publications on such subjects as senior housing and health issues, and advising the Board on the needs and best use of the Centre's premises.

6) The Centre's lounge and committee meeting room will continue to be used to exhibit retiree art, including painting, photography and ceramics. The Centre's policy is to include art by retiree family members. A reception is usually held when a new show opens. The Centre's policy is not to have exhibited art sold at the Centre but to have information available about how works can be purchased. The Board will appoint an Art Committee to reach out to retiree artists and assist the Administrator in mounting shows and organizing receptions.

B. Speakers Bureau

1) The Speakers Bureau has been and should continue to be the Centre's main outreach program. However, responsibility for maintaining and growing the Speakers Bureau should be shared with the College's Communications consortium. The policy of making the learning and speaking ability of many of the University of Toronto's senior scholars available, without charge, to groups in the community should continue.

2) Data collected by the Centre's Administrator for the last four years show variable use of this service which the Centre offers the community. The number of requests for speakers has varied annually from 16 to 61. The most recent records show a low point in requests. This likely reflects the fact that it is five years since the Centre's Administrator has had time to reach out to groups in the community who might be interested in having a speaker. Also the College has not endeavoured to recruit Fellows to be Bureau speakers, nor sought new speakers from the retiree community.

3) The Speakers Bureau should be strengthened and more closely connected to the College's academic program. This is not only because the Fellows of the College are a good source of speakers, but some of the people whom the Fellows invite to give talks at Senior College events

might be valuable additions to the Centre's Speakers Bureau. It should be a policy of the Centre to recruit speakers for the Bureau from these "outside" speakers at Senior College events.

4) The Centre Administrator and volunteers she has trained will continue to answer email and telephone requests for speakers, and put speakers in touch with the group that wants to invite them to speak. However, the tasks of reaching out to new potential user groups and recruiting new members of the Bureau should be carried out by College members who volunteer for this work. In effect, these volunteers will become additional members of the College's Communications Consortium. These volunteers with the support of the Administrator should report to the Board at least once a year on the use of the Bureau and any feedback received from its users.

C. Health Education

1) The Centre has organized and hosted a few events offering practical training and advice on health issues relevant to seniors. Twice, a registered CPR/defibrillator instructor was engaged to give a morning class. A leading gerontologist from the Faculty of Medicine gave a talk at the Centre to new retirees on senior health issues. These events were well attended and appreciated by Senior College. No events of this kind have been offered by the Centre since all academic retirees automatically became College members.

2) The Centre's health education activities should continue and be increased. CPR and defibrillator instruction needs to be renewed at least every two years. There are many other health issues on which the Centre could enlist health professionals to give valuable advice and instruction. The Board should establish a Seniors Health Committee to assist it in making health education a significant part of the Senior College Centre's program.

D. The Centre as a Source of Advice on Retirement and Retiree Perspectives at U of T

From time to time, the Centre's Board of Management has been asked for advice or has proactively offered advice to the University on policies relating to retirement and retirees. The University's retirees, unlike its alumnae, faculty, staff and students, are not treated as an estate of the university and have no representation on the Governing Council of the University. The Board of Management of Senior College is well positioned to be a vehicle for communicating retiree perspectives and interests to the University. Even though the Centre's mandate does not include retired staff, its Board's advice might help the University in considering how its ever-growing retiree community, including its retired staff, can be a valuable human resource and how its treatment of its retirees can enhance its public image and reputation as a progressive employer.

III New Activities and Programs

A. Senior College “Ambassadors”

1) It should be a policy of Senior College Centre to identify College Members/Fellows who are willing to serve as Senior College “ambassadors” to their respective University of Toronto units (e.g. departments, faculties, centres, colleges, the University libraries) to inform those who have retired or are considering retirement about Senior College – its activities and structure (i.e. the Member/Fellow distinction). Each “ambassador” would encourage her or his retiree colleagues to give permission to have notices of College activities and its news bulletins emailed to them.

2) Designating “ambassadors” is a key step that needs to be taken to give more reality to the decision of the University and College to make membership in the College automatic for retired faculty and librarians. There are still hundreds of College members who have not yet heard of Senior College – despite many attempts to communicate this information to them. Personal conversations with friends and colleagues might significantly increase the likelihood that all academic retirees become aware of the College and what it offers through its academic programs and the Centre.

3) This new activity can begin by having the College Principal invite a few Fellows with close connections to their units to perform the “ambassador” role. These “ambassadors” can report back on their experience as “ambassadors” so that the Board can determine how this activity is working out, and, if the results are fairly positive, encourage other Fellows to become “ambassadors”.

B. Technology Workshops

Senior College members are likely to have more time in retirement to make use of social media and the internet – email, Facebook, Twitter, blogging etc. It is also clear that there are serious risks involved in using these new technologies (e.g. hacking attacks). The Centre will invite Members and Fellows to participate in workshop sessions led by experts at the U of T and/or knowledgeable members of Senior College. The workshops will be organized by a Committee of the Board with the University of Toronto able to provide facilitators for these workshops, which are frequently held at the University.

C. Retiree Housing

1) RALUT, the retiree organization that led to the establishment of Senior College, actively pursued the possibility of a development on or near the University campus having housing suitable for University retirees. A survey of its members that indicated over 200 of its members were interested in this possibility sparked RALUT’s interest. Several Canadian universities and a good many in the United States have included housing especially designed and affordable for

their retirees on or near their campuses. Some of these projects include long-term care and are associated with their medical faculty's gerontology research.

2) Presently there are no University development proposals in which such retiree housing might be included. But it should be a policy of the Board of Management of Senior College Centre to be alert to this possibility as a component of future developments. The Vice-Provost who co-chairs the Board is in the best position to do this.

IV Funding the Centre

Implementing a strategic plan requires reasonable clarity about funding – not in precise terms of dollars and cents, but in terms of sources of funds and allocation of responsibilities. While there have been some official statements about funding the Centre, and some correspondence, these do not come close to constituting a funding plan for the Centre.

In a Letter of Understanding attached to the 2005 Memorandum of Agreement between the University and the University of Toronto Faculty Association that discussed the end of mandatory retirement, the University expressed its commitment to develop and administer “in collaboration with retirees” the continuing academic and professional interests of retired faculty and librarians. The letter spelled out in some detail retiree entitlements to shared office space, support for research funding and the establishment of retiree centres on all three campuses. This commitment was qualified by stating that the extent of this support “would depend on available funding.”

In May 2008, the Planning & Budget Committee of Governing Council received for information the Report of the Senior Scholars Centre Project Planning Committee (headed by then Vice-Provost Edith Hillan and Elizabeth Sisson, Vice-President for Campus and Facilities Planning). It allocated \$415,000 for the cost of renovations to the designated St. George campus Centre space at 256 McCaul Street, plus \$36,000 per annum from the University's budget “in total occupancy costs.” This occupancy cost effectively represents the total amount that the University could realize were it to rent the space to a faculty or academic unit, or to an entity external to the University. This occupancy cost has since risen to \$47,000 per annum (as of 2018).

When the Centre opened in the fall of 2009, a practice developed whereby the University through the Vice-Provost's office paid for the Centre's material needs — space and its maintenance, supplies, and office equipment — while the Fellows of Senior College (founded in June, 2009) paid for expenses incurred in carrying on the College's academic programs. The Fellows also undertook to reimburse the University for a portion of the Centre Administrator's salary that was devoted to supporting the College's academic activities; in 2015, \$1,000 was

budgeted for this reimbursement. But as the College's program rapidly expanded, it became clear that, at most, Fellows fees could pay for only a small part of the work the Administrator did to support Senior College.

While the College did in certain years provide reimbursement in the range of \$1,000 to the University for the Administrator's salary, the University otherwise paid the full cost of the Centre Administrator's salary, with the Administrator role being filled as a half-time 50% FTE role from June 2009 through to September 2013, and then fluctuating from 50-60% from 2013-15. In 2015, then Principal Peter Russell approached UTFA to request additional funding that would enable Senior College to increase the Administrator role to a full-time, 100% position. UTFA agreed to this request for one year, and in September 2015, UTFA began to provide top-up funding to increase the role to 100% (UTFA thus providing funds equivalent to 40% of the Administrator's salary, and the University continuing to provide 60% of the Administrator's salary.) This top-up funding from UTFA continued for three years, with UTFA ceasing this additional funding in September 2018.

In February 2016, Vice-Provost Sioban Nelson wrote to Senior College Principal Peter Russell advising him that her office would pay for the removal of carrels from suite 412, the remodelling of the carrel room, which included the purchase of new tables and chairs, and signage changes indicating that the Academic Retiree Centre had become the Senior College Centre. The Vice-Provost's letter stated that "there are no further provisions for Provost's Office funding of Senior College or the Senior College Centre." She stated that her office would pay 60% of the Administrators' salary through to September 2019, and added that "the Provost's Office will not expect that Senior College provide any sort of contribution towards the defraying of the Administrator's salary."

On April 25, 2018, the University and UTFA reached a Memorandum of Agreement which included a provision regarding the Senior College Administrator's salary. As a result of that Agreement, in September 2018, the Provost's Office informed the Senior College Principal that the University would continue to provide funding for the Administrator role at 100% through to June 30, 2020.

Building on past practice, funding the Senior College Centre should be based on two sources of revenue: Senior College fund-raising (towards supporting the programs developed for the Senior College Centre), and University funding through the Vice-Provost's Office (for maintenance, furnishings, equipment and supplies for the Centre).

Senior College should add the Senior College Centre to its fund-raising priorities. Although the Fellows of the College constitute only a small portion of the retiree community who will use the services provided by the Centre, they benefit from the services and should have the option of

contributing to the maintenance and improvement of the Centre as well as to the College's academic programs. If the Centre's Board of Management identifies an improvement in the Centre that it would like to have funded in part or entirely by fund-raising it should ask the College's fund-raising committee (that works with the Division of Advancement) to take this on.

But the main ongoing responsibility for maintaining and operating the Centre should remain with the University through the Vice-Provost's office. Beyond maintenance and operational costs, if and when the Centre's Board of Management approves new Centre services or activities that require funding or in-kind support, the Board should work with the Provost's office to see if the additional funding or in-kind services are available. Both the University and Senior College agree that each benefits from this mutually advantageous relationship, and that each entity contributes to the other.

V Conclusion

1) This strategic plan for the Senior College Centre calls for a strengthening of the Centre's existing programs and the addition of two new programs, Senior College "ambassadors" and Technology Workshops, aimed at increasing the value of the Centre for the constituency of retirees it is designed to serve. A measure of success in achieving this goal will be a significant increase in the number of College members (Members and Fellows) who are connected to the College at least by email. At present that number is just under 400. The total membership since all retired faculty and librarians have become members is estimated to be at least five times that number. A reasonable goal to aim for over the next three years is to double the number of members who are in touch with the College, which will be measured by the number of individual retiree email addresses that are included in the College's list-serv. In this regard, the College will increase its outreach to The University of Toronto Scarborough and The University of Toronto Mississauga with the aim of enhancing the awareness of the College and its activities of retirees from these constituencies. Initial steps in this direction have already been taken with UTSC, including an invitation to Fellows to attend a pub night at UTSC and a visit by Fellows to a talk in the Great Exploration series. Officials at UTSC are interested in the options for retirees available at Senior College. It is anticipated that increased interaction of the College with UTSC and UTM will result in enhanced participation and connection of members from these campuses with the College.

2) Enhancing existing programs and adding two new programs cannot be done all at once. It will be important for the Board to establish a schedule for these changes and priorities among them. Additional outreach activities for the Centre, such as additional refugee sponsorship beyond what is already underway, and interfacing with compatible organizations such as the

Royal Canadian Institute, have been suggested. But the Board should be wary of the danger of overloading the Centre and its limited resources, and monitor carefully how well the Centre is doing with respect to meeting its agreed upon priorities. It will be particularly important to see how effective the Board can be in establishing and recruiting members to the committees that are envisaged as doing most of the work in implementing the changes called for in the Plan.