Emory Retiree Engagement
May 15, 2013 Employee Council Meeting
Martha Fagan, Mary K Roarabaugh and Pat Douglass, Presenters
Emory Retiree Engagement

- Working group of DAR staff studied the issues around retiree engagement during FY13.
- Three categories of retirees at Emory include retirees from Faculty and Faculty Emeriti, Emory University and Emory Health Care.
- Faculty retirees are well served by the Emeritus College.
- Staff Retirees have little connection with university post-retirement.
Emory Retiree Engagement

Working Group Activities
Fifteen member group including staff from DAR, Human Resources, Emeritus College

- Reviewed data on retirees including engagement, giving, email accessibility etc.
- Benchmarked 14 universities including Yale, Duke, Wash U, UCLA, USC, Hopkins.
- Areas of interest included benefits and services, communications, fundraising, events and programs.
- Made some recommendations to DAR, but much of what is needed is outside DAR purview.
Retiree Data

- **Faculty Retirees**
  - 567 retirees, 544 with email addresses
  - 508 are or have been donors to Emory

- **Emory University Staff Retirees**
  - 619 retirees, 563 with email addresses
  - 271 are or have been donors to Emory

- **Emory Healthcare Retirees**
  - 906, 57 with email addresses
  - 176 are or have been donors to Emory

- **86% are living in Georgia**
Communications

- Retirees must make an effort to receive most communications.
- Only benefits correspondence and annual invitation to Staff Day are routine.
- Emory Magazine is not mailed to retirees; email distribution has recently been updated to include retirees.
- Office of Annual Giving solicits retirees as part of MyEmory campaign.
- School communication with retirees is inconsistent
- Retirees receive good information about benefits, but little on post-retirement engagement.
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Programming

- Retirees must make an effort to learn about campus activities.
- Retirees not routinely invited to school or university programs.
- Retirees are invited to Staff Day.
- Some Emeritus College programs are appropriate for all retirees if communicated.
- Schools invite retirees inconsistently.
- EAA has started to invite retirees to signature programs around the country.
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Benefits to Retirees

- Continued engagement in university activities.
- Access to continuing education
- Knowledge of available services/programs and volunteer opportunities.
- Fosters social interaction with fellow retirees and former colleagues.
Benefits to Emory

- Accessible pool of temporary employees and volunteers.
- Potential increase in donations to Emory if retirees are engaged.
- Pool of potential mentors for staff and students. (e.g., geriatric mentor program in SON)
- Potential subjects for research and clinical trials.
- Educated ambassadors for Emory in the community.
Emory Retiree Engagement

Key Issues

- Other than for benefits, no one “owns” staff retirees.
- Retiree benefits are strong and need to be regularly communicated.
- Emeritus College can be an excellent partner but cannot merge with staff retirees.
- National trend is toward inclusive retiree organizations, often with volunteer working boards.
- Will require collaboration/communication across units, schools, programs
- Will require regular communication to retirees via email and occasional printed newsletter.
- Need materials distributed at time of retirement to communicate Emory’s interest in future engagement. Need tools to gather email addresses especially from health care employees.
Opportunity for Employee Council

- Staff retirees need an advocate to raise issue of retiree engagement.
- Recommend consideration of a broad Emory University Retiree Association to include all categories of retirees which will work collaboratively with Emeritus College as a partner.