

June 19, 2018

TO: ARRUF Steering Committee

FROM: Priscilla Huston, Chandler Davidson, and Linda Driskill

SUBJECT: 2017-2018 Report of the Membership Committee

Membership has been a challenging responsibility, largely because of the difficulty of identifying eligible members. Membership seemed easy enough when the ARRUF Charter was written: all retirees in all classes of faculty would AUTOMATICALLY become members and their spouses or domestic partners would automatically be associate members. Alas, nothing about this process has been automatic, although Diana Heard and others in the Provost's Office have done their best to build a list, enter it into an e-mail list, format it in an Excel Spread Sheet, and update it every time someone notified us about an eligible person who had not received one of our invitations or notices.

### **Why Is There a Challenge?**

Let us not count the ways: there are too many. But even so, they are relevant to solutions. . . .

First, the University does not keep an official list appropriate to our purposes. When the employment contract is severed, no faculty member's name is automatically entered into a list that is maintained for the purpose of future communication.

Second, many partial lists are maintained in different parts of the University, and entities do not wish to share their lists. Development and individual schools keep lists to communicate with prospective donors; the Association of Rice University Alumni has such a list. Many lists contain faculty names, but the lists may not specify whether the person is retired. Because these lists are primarily for the purpose of raising donations, entities are not eager to share them.

Third, some "retired" faculty are hard to identify because they are nonetheless employed at Rice and therefore seem "not retired," depending on the type of financial contracts involved. If a retired faculty member is hired to teach a course or work on a research project, he or she may be given a contract for specific duties, but there does not seem to be a list of all employees who formerly held faculty positions.

Fourth, some lists are partial and are not maintained over long periods. If a person decides to remain on the Rice insurance plan, then HR has a list of those enrolled for the current year as well as his or her dependents if the insurance coverage is for a family or faculty member and spouse.

Fifth, there are no public lists of who is about to retire. There are no official lists of who is about to retire until just before graduation, when department chairs transmit a memo to their deans and the deans forward them to the Provost. Retirement is a touchy subject, and individuals who say they plan to retire are not forced to retire on schedule. So no list is released until just before retirement occurs.

Sixth, spouses and widows or widowers are especially hard to find except through the kindness of friends or the use of earlier Rice directories. This is an especially grievous situation because spouses and families contribute time and energy to Rice over many years. Their contributions and potential need to be recognized, but we have not had the "person power" to do the tracking through former Rice directories. And even if we did the information would be at least 8 years old now.

## Our Plan for Improving Membership

In the year ahead (2018-2019) ARRUF should ensure that all Rice retirees who want to be notified about ARRUF events are on a membership list that can be used for communication and the preparation of a Members Only side to our web page. This work could be part of the executive assistant's part-time job in support of Diana Heard. However, the hunt for individuals, by itself, is not sufficient.

In marketing language, we must use broad rather than narrow strategies. We must use approaches that address the whole university because we don't have ways to narrowly target individuals. Our solutions must be broadly directed, ubiquitous, with broad goals: to increase knowledge about ARRUF, improve accurate understanding of the benefits we offer, and appear practically everywhere throughout the University as a positive partner in Rice University's Vision for the Second Century, Second Decade.

- The directors should make a special effort to expand the Membership Committee. This past year Priscilla Huston was added as a co-chair to the Membership Committee in February, and Chandler Davidson, the other co-chair, is acting in an advisory capacity only. It will take people to embark on any time-consuming research. This committee did not have enough members to undertake comprehensive solutions.
- **WORK TOGETHER. The Committee should work with the directors, the communication coordinator, the University Liaison Committee, the Activities Committee, and the Nominating Committee to ensure that membership goals are shared and promoted throughout all parts of the organization's functions. We see that as involving several initiatives:**
  - The Membership co-chairs should send a personal welcome to each new member emphasizing the benefits and opportunities of ARRUF membership and inviting participation. There should be a way for the recipients to respond to this invitation.
  - The Membership Committee could organize a series of lunchtime tables in the fall at Cohen House for new members to pair up with ARRUF colleagues.
  - The Communication Coordinator should send the monthly e-mail announcements to all members and use a software program to get members to "opt in" to receiving our communication.
  - The Membership Committee should work with other departments such as HR, the Provost's Office, the Faculty Senate and other groups to put a link and information on THEIR Websites to the ARRUF site [arruf.rice.edu](http://arruf.rice.edu). For example, ARRUF information should be available in the Faculty Handbook and in recruitment information for prospective faculty. ARRUF should be a highpoint of a faculty career, not a catch basin. We want people to look forward to membership. Some of our activities, at least, should be of interest to people about to retire, such as our book collection service. We need to "get the word out."
  - Human Resources could promote membership in several ways, and we could collaborate more closely with HR in planning workshops or publicizing their workshops that would be of interest to our members, such as Fidelity and TIAA/CREF workshops.
  - We also believe that the Membership Committee and ARRUF in general should work with HR to produce resources, in several formats—a workshop, an on-line resource, and handouts—to help spouses deal with the death of a spouse. These resources should be updated regularly and should give concrete advice about how to collect insurance, how to receive funds due, how to maintain memberships, how to deal with ownership issues on TIAA annuities, and so on. Having been part of the Rice family for a long time, spouses and members need to anticipate how the relationship will continue after the death of the faculty member or spouse.
  - Make everyone, regardless of health status or mental capacity, feel welcome and valued. As members slide from the capability for academic performance, friendship should be a constant and a bedrock value.
  - Finally, since membership is everyone's responsibility, we should engage in a campaign this fall encouraging sharing: "Bring another member with you!" Once people attend an event, we hope they, too, will expand the membership by reaching out to others.