

## COUNCIL OF UNIVERSITY EMERITI ASSOCIATIONS (CUCEA)

Remote Meeting

October 30, 2025

Hosted by UC San Francisco

### **ATTENDEES:**

*CUCEA Officers:* Joel Dimsdale (SD), Chair; Amy Block Joy (B), Clair-Elect; Jo Anne Boorkman (D), Immediate Past Chair; Mary Gauvain (R), Secretary; William Parker (I), Treasurer; George Miller (I), Information Officer; Jim Chalfant (D), Web Master

*Emeriti Association Presidents, Vice Presidents, CUCEA Representatives and Alternates, and other Committee Representatives:* Fiona Doyle (B), Rick Van Sluyters (B), Linda Bisson (D), Suad Joseph (D), Craig Behrens (I), Ken Chew (I), Susan Lessick (I), Jessica Utts (I, Survey Coordinator), Dan Mitchell (LA), Darlene DeMason (R), Jose Wudka (R), Steve Adler (SD), Richard Madsen (SD), Frederick Finzen (SF), Susan Janson (SF), William Wara (SF), Denise Bielby (SB), John Gilbert (SB), Muriel Zimmerman (SB), Eli Silver (SC)

*Other attendees:* *Berkeley:* Caroline Kane, Kenneth Polse; *Davis:* Amanda Crisman, Larry Thao; *Irvine:* David Brownstone; *San Diego:* Christine Hunefeldt, Phyllis Mirsky, David Rapaport, Deborah Spector; *Santa Cruz:* Judith Habicht-Mauche; *UCOP:* Kent Black

*Speaker:* John Perez, UC Regent Emeritus

*Center Directors and Liaisons:* Cary Sweeny (B); Juliane Crowley (D); Emil Nguyen (I); Ayesha Dixon (LA); Cristina Otegui (R); Christy Dawley (SC); Ellen Pasternack (SB), Larissa Foggiano (SD), Mary Garcia (SF)

### **8:30 Greetings and introductions: Joel Dimsdale, Chair**

Joel called the meeting to order, welcomed attendees, and asked them to introduce themselves and their campus affiliation. He then gave an overview of the agenda.

### **8:40 - Officers reports**

#### **Chair - Joel Dimsdale**

Joel reminded the group that CUCEA is a voluntary organization with no staff support and that CUCEA is always interested in volunteers from the campuses to participate in all sorts activities. If anyone is interested in volunteering to help in any capacity, Joel asked them to get in touch with him.

Joel thanked several individuals for their contributions on behalf of CUCEA:

- Bob Kaplan (LA) and Amy Block Joy (B) for serving on several RFPs related to health care;
- Dan Mitchell (LA), Susan Lissick (I), and Suad Joseph (D) for reviewing and commenting on various drafts regarding HR benefits;
- J. Utts (I) for conducting the emeriti survey;
- Ken Polse (B) and Bill Parker (I) for serving on the recall policy workgroup.

Joel also thanked CUCEA board members and representatives who serve on various systemwide Academic Senate committees including Faculty Welfare (UCFW), the Healthcare Task Force (HCTF), the Task Force on Investment and Retirement (TFIR), the Joint Benefits Committee (JBC), and the Emeriti/Retiree Advisory Council (ERAC) that meets quarterly with systemwide HR and the UC Retirement Advisory Board).

CUCEA had a retreat last month with representatives from the campus emeriti groups to talk about any concerns on the campuses and to find out if there are issues that campus associations would like to have addressed in the semi-annual meeting. Attendees expressed interest in IT issues, which is why the head of IT was included on the agenda of the joint meeting yesterday. There was also interest in discussing the financial challenges experienced by the campus emeriti associations, and there will be a report on this topic toward the end of today's meeting. Joel thanked Larissa Foggiano, Director of the UCSD Retirement Resource Center, for compiling the data on behalf of the various campus retirement centers.

Joel reminded the group that open enrollment is coming and there may be more people than usual who want to switch health plans. He encouraged members who are taking unusual or expensive medications to make sure those medications are covered in an advantageous tier for pharmacy benefits. Similarly, it is important to check network access issues. He advised members to get their medications refilled before the end of the year because each program has a different Pharmacy Benefits Manager (PBM) and it is important not to run out of medications if new paperwork is needed after January 1.

Joel thanked UCSF for sponsoring the meeting and for providing crucial IT support for it. He then described a couple of issues that the CUCEA board is tracking at the moment.

The Anthropic Class Action law suit is relevant to emeriti who have books that have been accessed by the AI company Anthropic without authorization. Anthropic has entered into an agreement that stipulates if an author's published

work was accessed without their authorization, the author may be entitled to as much as \$3,000 per book. Information Officer George Martin circulated a letter in mid-October about this law suit that includes a link to find out if a published work is included in the lawsuit and what to do if it is.

The board continues to track recall issues (Return to Active Duty, RTAD). New procedures were put in place this year and they need to be monitored to be sure they are effective. If any emeriti are having problems with RTAD, let Joel know.

The University Retirement System (UCRS) had a banner year in terms of investment performance, and it will be announced soon how the Retirement Savings portfolio has done. Earnings will need to be smoothed out actuarially over the last three or four years, but it was a good enough year to shift things positively in terms of the retirement system portfolio.

### **Chair-Elect - Amy Block Joy**

Amy announced that the document *Staying Connected After Retirement* was distributed to all emeriti on September 25 by George Miller. It includes information about how to stay in contact with the University after retirement. It is important that emeriti authorize UC RAYS to share their email address with campus associations. To do this, an emeritus should go to the UC Rays home page, click the category labeled Email and Phone, and at the bottom of that page there are two questions about consent to share your email address with the retiree groups. It is especially important to provide consent if your email address has changed. Consent helps emeriti associations get in touch with recently retired faculty. An attendee asked if these instructions could be sent in an email to emeriti and Amy said that George would resend this information.

Regarding Open Enrollment, Amy noted that there is a glitch in the materials about the formulary drug list; the lists for Anthem PPO and United Healthcare are not included, and they can be gotten from Amy.

### **Immediate Past Chair - Jo Anne Boorkman**

Jo Anne provided an update on the CUCEA Archives project. UCLA is not taking new archives this year, and JoAnne will continue to work with UCLA to get any paper records they have stored on campus at the Southern Regional Library Facility (SRLF). Jo Anne and Jim Chalfant are working with a student at Davis who is scanning some of the paper records to make them available online. The initial documents being scanned are CUCEA Newsletters. Jo Anne thanked Ayesha and her staff at the Retiree Center at UCLA for their help.

Denise Bielby asked Jo Anne if there are any archives about the Panunzio award for emeritus research scholarship. Jo Anne said it was set up in honor of UCLA

Professor of Sociology Carlos Panunzio, who was instrumental in working with the administration to create the retirement system. Denise asked if there was a time delay between his bequest and establishing the award. Jo Anne said she believed there are some folders in the paper archives related to this award and she will check.

Dan Mitchell suggested that archived materials be put in the Internet Archive. Jo Anne said this will be done for electronic files and scanned documents, but it is not clear what to do with the paper files. We do not want to destroy them, but we do not have a place to store them once they are retrieved from UCLA. Some attendees asked Jo Anne if she would have more paper files to distribute at the April UCLA meeting, and she said the plan is to get the paper files to Davis and work on them there.

### **Secretary - Mary Gauvain**

Mary asked for a motion to adopt the distributed minutes of the April 24, 2025 CUCEA meeting at UCR. There were two corrections regarding the spelling of two attendees' names. Mary asked for a motion to approve the minutes as corrected, which was advanced and seconded.

**ACTION: The minutes of the April 24, 2025 meeting were approved.**

### **Treasurer - Bill Parker**

Bill reviewed the financial statement. He said the organization is in good financial shape. The income includes \$471 dues from one campus that was outstanding when we last met. We also received a \$2000 annual contribution from the office of the Academic Senate. Expenses include annual dues to the National Organization of Retiree Associations, travel associated with archive management, travel of the officers to the spring meeting of 2025, and website maintenance. In the last six months, the cash flow was \$2580, resulting in the net worth of \$20,520. Bill projects about \$1000 in expenses before the end of the year, which will leave the organization with approximately \$19,500. He does not foresee any financial challenges in the immediate future.

Bill then went over the proposed budget for the current year, endorsed by the Executive Committee. It projects about \$5,000 in expenses during the next 12 months, with the largest expense being the officers' travel to the spring meeting at UCLA. The annual dues for the National Organization of Retiree Associations is listed, along with continued expenditure on the archives and related digitization, and website maintenance. We have no bank fees. The projected income includes \$3000 from campus dues and we expect the Academic Senate will contribute \$2000 next spring or summer, for a total of \$5,000. Bill described that campus dues are based on membership, that is, the number of emeriti on a

campus receiving payments from the retirement system, information provided to us by RASC. The proposed budget was moved for approval and seconded. Bill was asked if all campuses have met their dues obligations and he replied in the affirmative. With that, the proposed budget was approved.

**ACTION: The budget for 2026 was approved.**

Subsequent discussion focused on campus financial issues. UCSD struggles with bank fees for processing credit card payments for dues and other costs (e.g., annual luncheons). Bill was asked if CUCEA has run into problems with fees and he said no, he uses a checking account that has no additional fees. UCR and UCLA use PayPal accounts that charge a fee to process credit card payments. UCSB operates on philanthropy and most donations come through the development office, which takes 6% off the top. At Irvine, the campus development office waives fees.

**Information officer - George Miller**

George reported that the number of people who receive information from CUCEA by email has increased. He is mindful of the fact that he does not want the information he sends to members to detract from communication from local campus emeriti centers. He will continue to keep the campuses as informed as possible and he asked the campus center directors to tell him if a campus or members are not getting information from him correctly or at all.

**Webmaster - Jim Chalfant**

Jim said that the long range planning exercise again raises the question as to whether the CUCEA website is a news or archives site. Its current status is as an archive. Jim noted that people who want UC news might read Dan Mitchell's blog every morning. If campuses want the CUCEA website to post news, the news should be sent to Jim and he will post it, but the site was not set up for news and doing so will break up the current formatting of the information. Jim said that Jo Anne did much of the foundational work in setting up the site using files she received from Louise Taylor. Jim welcomes corrections to information on the site, but for now it will continue to function as an archive. He stressed that historical records, especially about the history of emeriti benefits, are important for CUCEA to archive. He asked that campuses send him updates, especially regarding changes in campus officers. Jim also welcomes campus photos to add to the site. He added that there may be a lag between when information is sent and when it is posted because the programmer does not work every day. He asked that people let him know if any of the links on the site do not work.

Joel asked if there are any records on file of offer letters when current emeriti were hired that include information about the benefits packages offered in past years. He said these would be useful as reference when there are changes in benefits. JoAnne replied that she does not believe there are any on file, and given that these are individual personnel letters, she is not sure they should be on the site. She said many people remember being assured that health benefits were part of the retirement package, but, as we have learned, the University has a different understanding. Amy said she checked her records from when she was hired in 1980, and the language about health benefits did not have the disclaimer that contracts have now. However, the wording then was vague. She said it is interesting that OP representatives, including those who spoke at the joint meeting yesterday, refer to health benefits as a privilege and not a benefit. David Brownstone said there was a lawsuit by University employees at Lawrence Livermore about this issue, and there was a settlement and some class of early employees got some compensation. But the courts agreed that retiree health benefits are optional and up to the Regents, whereas the pension is a different form of obligation and guaranteed to retirees. This commitment is in a written document that is filed with the IRS and if the University wants to stop paying the pension, they would have to pay everyone essentially the present value of their pension obligations. He added that the retiree health benefit is something to worry about whenever there is a budget crisis.

Roger Anderson said this issue concerns him greatly. He recalled that the lawsuit with Lawrence Livermore was more favorable than David suggests regarding the return to employees who lost retirement benefits. He suggested that we try to get documents from Adrian Harris and Louise Taylor and others who had correspondence with the attorney who dealt with retirees from the lab. He stressed that we need to maintain that data. Joel agreed and said it might be useful to have these early records on hand if changes are proposed.

### **11th Campus Survey - Jessica Utts**

Emeriti surveys are conducted every three years. The most recent survey covered the academic years from July 2021 to June 2024. The current survey report is dedicated to John Vohs (D) who oversaw the survey until 2022 and recently passed away. John introduced the idea of emeriti as a virtual 11th campus to convey the idea that emeriti activities collectively equate to an additional campus. The next survey will be done in 2027 and focus on emeriti activities from July 2024 to June 2027.

Two features were added to the survey in the current round. One, which Jessica hopes will continue, is about emeriti philanthropy and the data were provided by OP. The other was about a range of emeriti scholarly activities, but the information received was scattered and difficult to compile into a clear story. The

survey report includes a brief summary of the results overall and there is also a breakdown by campus and year. In the appendix, the total contributions of emeriti are quite large, and Jessica believes this information is important to share with UCOP administration.

The report was shared with President Milliken, and Jessica quoted from his reply, which included “the notion of the emeriti community as the university’s virtual 11th campus is both striking and fitting. The ongoing contributions of emeriti to UC from teaching and mentoring to research service and philanthropy reflect a profound and enduring commitment to the University’s mission. Thank you for sharing your most recent triennial survey.” Jessica added that this snapshot of emeriti activity testifies to the remarkable depth and breadth of their efforts and systemwide impact, and it is important to keep that front and center in the minds of higher-up administrators. Campus emeriti association leaders should share the report with their administration, especially the chancellor.

An Excel file was created for each campus with their individual data, responses to three open-ended questions, and the email addresses of campus respondents. The file was sent to campus center directors and presidents of the emeriti associations, along with a Word file that explains the codes in the Excel columns. Two campuses have asked for shared access to the original Qualtrics file; if any other campus want this access, contact Jessica.

In 2024 there were 1403 surveys completed, substantially less than the 2078 received in 2021. This decrease is important because the report is a compilation of the activities of the respondents, so it important to get as many responses as possible. Reasons for the decrease may be that the survey was conducted later than in prior years, the timing coincided with other surveys sent out from the campuses, there were fewer reminders sent out by the campuses, the survey was conducted during the Open Enrollment period, and many emails may have been labeled as spam because of enhanced campus IT security protocols. It is important to be mindful of these issues for the 2027 survey and Jessica recommended the following: send the survey out in July, with the deadline in September, so as not to conflict with Open Enrollment. The timing may also help collect information from the most recent retiree group. She suggests reducing the number, type, and complexity of questions. Perhaps when campus representatives discuss the report with campus leadership, they can note what items they are particularly interested in and what other information they would like to see included in the survey. It is also important not to overlap with the timing of other surveys, and to create a plan for sending regular reminders from each campus retirement center.

Questions and comments:

Jose Wudka asked if it is possible to collect grant and contract money awarded to emeriti? Jo Anne said this information would not be available through OP, but it may be available at the campus level, though each campus may handle it differently. There was discussion as to whether OP has this information and, if so, what office might have it. OP has been helpful in providing philanthropy information about emeriti so it may be able to provide this information.

John Gilbert asked about publicizing the information, perhaps with a short video about the virtual 11th campus. He said UCSB has an oral history committee that may be interested in doing this, and he asked if any other campus has done this or is interested? Joel said that he does not think any campus has done so, but it is a nice idea and could be welcomed by administrators now when much of the news is difficult. Jo Anne presented the information to the Regents several years ago and it generated much interest. Jo Anne asked Jessica if she is interested in doing a short video interview at Davis with the video records project and added that it may be possible to find a student who wants an independent study project to create a short video on the survey and virtual 11th campus. Jo Anne and Jessica will discuss this idea further.

### **Joint Benefits Committee (JBC) - Roger Anderson**

Roger made several comments about the JBC report:

- He was pleased to hear UCOP's response to the report yesterday and to learn that JBC will get a written response, which has rarely happened before.
- JBC will need to look closely at what will be the administrative processes in future, there is not much clarity yet about how Shared Services will operate, including who JBC should be talking to in the new Shared Services office.
- JBC is unhappy with the metrics we receive from OP regarding RASC performance. Part of problem is that we don't know exactly what information we want from them. JBC will form a subcommittee to work on this issue and report back at the next meeting.

Comments and questions:

Joel also looks forward to the written comments from OP. He finds the new system that combines RASC, Shared Services and UC Path unclear, and the fact that we have yet to get hard data when requested is troubling.

Dan Mitchell said that OP gave us statistics about the dates of receipt of the first pension checks and survivor benefits. The former is 98% effective, but it is less so for survivors. This is troubling given that information about survivors is already on file at OP.

Amy asked where personnel records of retirees, including years of service, are kept? Joel said that Bernadette Green showed him a microfiche cabinet at OP

where all records are kept. He suspects that hard copies of personnel records are at UCOP, but he does not know for sure.

Jose asked about the metrics for RASC performance, and whether Roger thinks RASC will be responsive to JBC concerns, especially in light of the difficulties emeriti have with RASC when they retire? Joel said RASC's information about retirees seems to be improving, though survivorship issues remain troubling.

Ken Chew said that HR mentions that its performance is "best in class among peers", he asked if we can get more information about who we are comparing our practices to? He also noted that difficulties associated with survivorship are different from those for retiring because they include complications with wills and trusts. So, expecting the same timeline for survivors and retirees experiences may be unrealistic.

Suad Joseph said the UCD Faculty Welfare committee was contacted by a faculty partner of a current faculty who passed away. The partner had not heard of form UBEN-250, which one needs to file for a partnership to be eligible for benefits. She asked if anyone else has heard of this form? Joel said he has heard of a similar case this year. The form is about registering as a domestic partner and if it is not completed, the partner is not eligible for benefits.

Jo Anne said that there are new Webinars about survivorship and preparing for the future that will cover this information and people need to pay attention to it. It is complicated in cases where someone loses capacity before a situation arises. Preparing information in advance can help streamline the survivor issue. OP is concerned about addressing survivorship issues as best as possible.

Dan Mitchell said that California does not have common law marriage, so if you have not registered through some formal means with HR it is likely to be very difficult to get survivor benefits. But we must consider that even in cases where information is filed correctly and survivors are competent, there still seem to be substantial delays that need to be addressed.

Roger Anderson suggested to Suad that the individual contact Robert May who may know something about it. It is important to get beneficiaries in order, and it can be time consuming to do so. Statistics were reported as average and median numbers of days and there was a wide spread, which suggests there is great variability.

There was a Motion to accept JBC report, which was seconded.

**ACTION: The JBC Report was approved.**

### **Campus Retiree/Emeriti Centers Report**

Larissa Foggiano, UCSD Retiree and Emeriti Center director, reported on issues raised by the campus directors. The biggest challenge is the need for greater representation of RASC on each campus, especially someone with specialized knowledge about survivor benefits, Medicare options, and health benefit changes. Many retirees do not respond to online forms and would prefer in-person assistance. We also need more staffing at the campus retiree centers. Other challenges are emeriti parking and email access. More information about cybersecurity is needed. Individual campuses have local initiatives that could benefit from support and advocacy, such as from PCIA at UCB where there are concerns about disability needs and accessible support options. UCSB is currently in phase two of reclassifying their campus center coordinator, and UCR, UCSF, and UCSB are moving to new physical spaces on the campuses.

Joel asked if there are any differences across campus in who the retiree centers report to, and are there issues associated with them? Larissa said that issues seem similar across campuses even though reporting structures differ.

Dan Mitchell said at the last meeting that RASC said they will be sending out advisors to the campuses to work with the centers. Has this happened, and if so, how has it worked out? Larissa said they were told we would get in-person support from RASC, but most campuses have not gotten this support. Some campus directors reported some contact with RASC. UCSB said a representative came to campus for a day, UCSC is trying to set up such visits, and UCR had RASC representatives at the annual Benefits Fair.

Ken Chew asked Larissa if emeriti pose any special or unreasonable requests relative to other retirees? Larissa said emeriti are not a more difficult group to work with and are often quite helpful.

### **Campus Leadership Reports**

UCSD - Richard Madsen reported that the emeriti association continues to have a series of annual events, lectures, and meetings. The University has decided to audit the emeriti association. The audit began in August and the report is expected by the end of fall quarter. Campus resources are diminishing, and we have questions about what unit we are affiliated with and resources affected by it. Our mentoring program for first generation students is successful.

UCI - Ken Chew reported that the center has a vital and solid program going, and they are trying to improve and expand programming. They would like to make communications with emeriti more effective and are enhancing their

website. There is a lot of focus on parking issues now. The new director of the center, Mary Garcia, is doing great.

UCR - Jose Wudka reported that the center is continuing its standard activities. The emeriti association has a close connection to the retiree association, and the campus has committed to providing a new campus location for the retirement center. The campus continues to have retirement advisors. A glitch with parking was resolved by the president of the retiree association. We met with the new chancellor and he is interested in the associations and promises to continue good connections between the associations and the administration.

UCLA - Dan Mitchell said that the list of center's programs is in the report. He mentioned two items. First, we use to have an emeriti committee in the Academic Senate that was distinct from the emeriti association; its main functions were to grant emeriti status to people who are not automatically granted this status and to write In Memorium statements. This committee has been abandoned and we were told that the Faculty Welfare (FW) committee would take over these functions, but that has not happened. Emeritus status issues have been sent to CAP, which has not been very efficient in managing these applications. We are trying to address this problem with FW. The In Memorium statements, which are usually written by departments, have also run into problems and are being worked on. The second issue pertains to a new UCLA Medicare Advantage plan. The brochures seem to confuse many people, including employees, and this new plan is not on the menu of UC Open Enrollment options. Mailings about it go out to general population, so some UC retirees get them and this also causes confusion. Also, we have heard that other UC medical center locations may take up such an program.

UCSB - John Gilbert reported that the association has been busy with many activities, our report highlights some items. We have been advocating for years for a faculty liaison recall appointment, it is still not filled although a staff recall position has been set up to address both staff and faculty retirement issues. This person started in Fall and is helpful. We continue to survey immediate retirees every year, the survey just closed and the report will be out in a month. There are fewer complaints about the retirement experience than in prior years. However, there are still complaints about the transition to retirement medical benefits. Denise Bielby commented that emeriti biographies and bibliographies are not archived on the campus and she asked what other campuses do to archive these records. These records could be useful in various ways, including award documentation when applying for grants and writing In Memorium pieces, She also asked how valuable it is to have a formal liaison between the emeriti association and FW committee and how many campuses have this set up?

UCSC - Eli Silver responded to Denise's question by saying that at UCSC there is a committee on emeriti relations that is an AS committee and the chair of that committee is on FW. He then highlighted several campus issues, including computer support for emeriti. He said that RASC personnel have been assigned to the campus. There are concerns about the succession of president of the emeriti association. Eli is in his fourth year as president and a request was sent out to emeriti to see if someone is interested in taking on this position, but there have been no responses. He asked how this is done on other campuses. The association is in good financial shape. He said the report details the various activities of the committee.

UCSF - Susan Janson said the association is still waiting for a retirement center. They have been waiting for 3 years, and as a result they rely entirely on RASC for guidance on many matters, such as contacting people who have changed or lost their UC email. There is still lots of construction on campus, the University is trying to help with parking, but it remains disrupted. The emeriti association was folded into the alumni association, which will support the emeriti association in various ways, but there is only one staff person responsible for alumni, retirees, and emeriti. The succession in leadership is established by having a vice president assume the presidency when the latter steps down. There are a lot of retirees at UCSF who are not senate members and they do not retain their University email. Unless there is a way to get their personal email, the emeriti association loses track of them when they retire. It can be slow to set up emeriti status for retirees who were not senate members. The association has regular lectures, which are popular, especially those on medical research issues.

UCB - Caroline Kane said each department manages emeriti status differently and the association is trying to help streamline this process. Parking is expensive and spaces are few. The retirement center moved into new space this year and it is near public transit so individuals who want to have appointments about retirement can come in conveniently to do so.

UCD - Linda Bisson said the report covers most issues. The association is trying to develop and maintain a list of emeriti. They are also developing an emeriti computing guide, and they want to expand their role as advocate for emeriti as well as involvement with AS and UC issues, such as commenting on recent issues and reports.

### **Conversation with Regent Emeritus John Perez**

Joel introduced Regent Emeritus Perez and described his appointments as a member of the California Assembly, Speaker of the California Assembly, and UC Regent from 2014 to 2024.

*Q (Question)- What struck you most about the job as UC regent?*

R (Response)- My friends from my undergraduate days at Berkeley said they were more surprised that I would become a regent than that I was the speaker of the state legislature. It's a very deliberative body and it's one that I think struggles with what its ongoing identity is, which fluctuates even more than the legislature or other governing bodies based on the personalities around the table and the amount of time people are willing to spend engaging in discussions. My frustration coming in the door was a predisposition for a lot of board members to just rubber stamp the president. And maybe it's my training as a labor leader, and maybe it's my training as a legislator, to believe in constructive tension. Constructive is the key part, but tension is also important. In a system that values shared governance, there should be uncomfortable moments from time to time where we challenge each other's preconceived notions on how we should address different issues, and where we remind ourselves of what the broader mission of the University is, and our obligation to deliver on a public good. So I sometimes struggled with convincing some of my colleagues that that should be our approach, or navigating some of those difficult conversations. I think everybody I dealt with was incredibly well intentioned, but what they saw as the totality of their role was very different, person to person, in leveraging the collective wisdom and the benefit of having that assembly of folks. I think that was more difficult than I expected.

*Q- How much time did it take?*

R - It took a lot before I was chair, probably a good 15 to 20 hours a week. As chair, it was 30-45 hours a week. It's an uncompensated position, completely voluntary, so my staff and my business had to chip in and help with some of the prep work, they really deserve a lot of credit for being selfless in that regard. So it was an act of public service on my part, and on my staff's part as well.

*Q- What do you do now?*

R - I have always had a small strategic consulting practice. I do a lot of work in renewable energy. We're building the largest solar farm in the state, about 60 square miles. We're also working on building a large water storage bank at the north end of Kern County, south end of Antelope Valley, which will store between half a million and a million acre feet that are deployable during droughts and other environmental emergencies the state has. We've been working on a range of topics, but renewable energy and water probably take the most amount of my time, and then a little bit of time in healthcare. For example, at UCLA, we set up a Medicare Advantage Plan when I was on the Board and chairing the Health Services Committee, and I continued to serve on the board of this Medicare Advantage Plan once I left the Regents. What's interesting is we're taking a tool that's increasingly popular, Medicare Advantage plans, and taking out the insurance companies and having UC doctors at UCLA take the lead in the

design, which creates higher capitated rates for the actual provider, with some strong incentives for quality of care. In the first years we were hoping to have 7000 enrollees and we're at 12,000. We're looking to get to 20,000 in the next couple of years. We were expecting to lose money for the first three years. We expect in this first year of full operation that we'll make a tiny bit of money in reserves that we'll be able to invest back, and it's something we want to ultimately offer as a retirement option for UC retirees as well, starting in LA County and then building out where we have better pathways for folks to avail themselves of UC affiliated doctors and hospitals than they would in other managed healthcare arrangements under Medicare.

*Q - What advice would you give in the University's beleaguered situation now?*

R - It is hard to give advice when you only have a subset of the facts. So I have the same set of facts that you all have, and the facts are incredibly troubling to me. And so I think on one hand, the University shouldn't just fight for the sake of fighting, but I do think the University needs to fight to protect the core missions of the University and what we offer, not only to our students, our faculty and our staff, but broader society. So without benefit of being in the room, I'm kind of wishing that there were a little more fight that was publicly available to all of us, because I think this is the most existential threat that higher education has had in the history of this country. And I know that sounds like a lot, but it really is true when you look at what the Trump administration is demanding, not only in terms of money, but in terms of oversight and infringement on academic freedom. I think that really cuts to the core of who we are, who we've always been. It flies in the face of the constitutional protections that California created when the University of California was created. So if you look at Article 9, Section 9 of the State Constitution, one of the things that's very clear is that we should be free of sectarian influence, and the University has been very good about guarding against sectarian influence historically. But it's more at issue today when you look at the challenges with defunding first and investing second and undermining the integrity of the original research. This is not only hugely impactful to the folks that are directly involved in that work, but to the public good that comes out of so much of the research that happens at all our campuses. When you look at the chilling effect of what was done during the first Trump administration, what's being done now, and its impact on us being able to attract the best and the brightest from around the world, where they're coming from as our graduate students, our faculty, or just coming for a short time to collaborate with us. That has global impact. And you know, we've seen it in other parts of the world at different points in time, where the attack on universities, the attack on basic science, led to a brain drain from a variety of countries. The notion that we'll be as successful as we've been historically in attracting top academics from around the world, given these dynamics, if they're unchecked and if we don't fight back hard enough, that's very scary to me. So I

wish there was a little more full throated public response that was articulated. I think we've been a little soft on talking points, too often talk is in general terms about the good that comes from the University, the economic activity that comes from the University. I think these are fine for normal circumstances. These are not normal circumstances, and I think that they necessitate leaders going above and beyond in articulating what's the issue and how hard we're willing to fight to protect the integrity of our institutions.

*Q - What about the state? Can or should we be doing anything differently?*

R - Yes. It's good for the governor to say we shouldn't sign these agreements with the Trump administration. I don't like the fact that he threatened to withhold state support for folks, because I don't think it should be a question of picking which force you're trying to avoid getting pressure from. I think that the moral high ground was to just say we shouldn't sign off on these agreements. They fly in the face of our values and the integrity of the institution. But I think the second step should have been the following. Even with California's tough fiscal circumstances, I know something about them. I inherited the speakership during the height of the Great Recession and had to take us from a \$50 billion deficit to a multi-billion dollar reserve. And I created the California Rainy Day Fund, which the voters then approved, that stashed about \$18 billion that the state could use in tough times. So it's a 2 or 3% swing. So I think the thing the state could do to backstop us is give a zero interest loan for the money that's at issue in our fight with the federal government that we would repay once we won the legal battles and regain the funding that was at issue. It's one thing to say the research matters, but you need to put your money where your mouth is and fund the research while we're fighting the fight.

*Q - It seems like a very difficult time and the University will come out different, how do you think it will look a few years from now?*

R - A couple of things. One, I think the money is the least problematic element. We can figure out parts of it, but if we give up our core values and the structures that protect academic freedom, that's the most dangerous part. If we let this administration fundamentally change the complexion of what higher education looks like in this country, and quite frankly, what it looks like in the developed world writ large, that's the biggest issue at stake. If we can protect everything else the University does and fight over money, I'll take that fight any day over any equivocation on protecting that which makes us special and that which makes higher education, especially our higher education, so important. So how much we change is significantly based on how much we concede. It's my hope that, in the end, we concede nothing on these questions, and then how much we change is what other protections we build around the institution. Going forward, this is an incredibly dark moment, and we have to go in with eyes wide open on what we could do if a moment like this presents itself again in the

future. And I worry about what's happening at other places. I'm more optimistic that UC weathers this. I'm more worried when I see what's happened in other states, where state governments have done many versions of these attacks. I'm more worried when I look at the fact that over the last dozen years, we've seen an increased percentage of the electorate who views higher education, and public higher education in particular, as a net negative for society. These are some societal fights that I think we have to struggle with for the long term, and then we have to ask ourselves, where could we have done a better job of avoiding some of these problems. And so I am going to say something uncomfortable here, and I've said it in other places as well. I think, for example, what this administration has done is take a political imperative undermining higher education and an opportunistic imperative tying it to a spike in anti-semitism, and conflated the two issues in a way that's weaponized something that problematic. But I also think it's true that we as a university have not always done our best work at shutting down hateful activity, and in the most recent example, a really persistent pattern of anti-semitism that popped up in a lot of places and where we struggled with how to protect first amendment rights, but also create protections. It's an expression of our values. In this instance we could talk about Title 6, but in other instances, other things come up. I struggled with the University 20 years ago when there were spikes in anti-African American activities on campuses and we struggled with how we responded. And so I think you need to think about the group at the moment it changes, but we have an obligation to look past just the reflexive First Amendment only analysis to figure out how we balance things we hold in tension.

Joel then asked whether any of our members have questions.

*Dan Mitchell from UCLA - I take your point about the dollar aspect of it, but I did note that President Milliken made a comment about the various demands in this lengthy memo that was recently made public. He cited the billions dollars and said that, by itself, renders the whole thing off the table. He didn't go into some of the other aspects that you've been emphasizing. And I'm wondering whether you think, in fact, the Trump administration, by throwing in that billion dollar issue, is really signaling that they don't want a deal, that they think that they know that that's a kind of non-starter, and they want to just keep the pot boiling.*

Regent Perez - I think that's a very real likelihood. I mean, this administration values ongoing consternation and chaos. So I think it is less important to them than the fight. That said, I differ with President Milliken. The non-starter for me are the things that really cut to the core of what we do. Money is much more easy to deal with than the values-based conversations. Now \$1.2 billion is a ridiculous amount of money, but if they drop that by \$100,000, that doesn't make it any more palatable.

*Joel - One of the politicized criticisms of universities is the allegation of elitism, are we guilty of this?*

Regent Perez - We always struggle with the balance between being elite and being elitist, but they are two very different things. I think it is appropriate and important for us to be elite, but not be elitist. So what's what? What do I use as a distinction? Elitist is exclusionary. Elite is about how aggressive we are in excellence, and I think we can be aggressive in excellence and open at the same time. So elite is a good thing, elitist is a bad thing. But I also think it's really kind of a longstanding narrative about a liberal elite, and a longstanding challenge. I think, is true historically. If Mary Gouvain will forgive me for picking on the Academic Senate for a moment, departments across each of our campuses have struggled from time to time with an imperative to replace themselves, as opposed to figuring out what other perspectives and research and world views might help us get to the next level in whatever area that we're working on. And so I think there's a natural human tendency to do a little replication, and I think that's left us a little vulnerable to some of the elitist type talking points. But I think it's more accurate to call us elite than elitist.

*Amy Block Joy from Berkeley - It's an honor to have you join us, and I'm hoping this is an easy question for you. Could you provide a highlight of your term as Regent?*

Regent Perez - There were a couple. When I was in the legislature dealing with the Great Recession, you had massive disinvestment from the University. In the first couple of years, there was roughly an \$800 million reduction in investment, that was hugely impactful on the operation. And one of the things the University did to survive was that year over year, there were double digit increases in tuition. So I worried when I was still in the legislature, and I was on the Board then and Speaker, that that was creating hurdles, especially for middle class families to send their students to our campuses. So I wanted some predictability. It's what motivated the Rainy Day Fund so we'd have fewer of these cycles, but it's what motivated me to fight to eliminate broad based tuition increases and instead create the cohort tuition model that we enjoy now. So when a student gets admitted, we promise them and their family that for the next up to six years while they're with us as a freshman admit, or four years as a transfer admit, their tuition will not raise. So you get that predictability for families, but it also depoliticizes year-over-year adjustments. So we pegged it to be no more than the CPI. So you did two things at the same time. You created predictable, affordable models for students and their families, and you created a predictable increase in revenue for the University. You also did a third thing, you actually made it more affordable for our poorest students because of our commitment to return to aid. Because as we froze tuition before that, tuition was

flat, but non-tuition related cost of attendance was going up, so that for the non-tuition group, cost of attendance was greater than tuition, but you're only doing financial aid based on the tuition portion, so you weren't able to keep pace with actual affordability. So creating that cohort model created greater predictability for families, greater tools for financial aid for total affordability, and greater predictability and even increases for the University. That's probably one of my prouder moments.

*Joel: Do you have any last comments you want to send us off with?*

Regent Perez: I appreciate the careers you've all committed to this institution and your willingness to continue to be engaged to further the University. Thank you for inviting me to join you.

*Joel: Thank you very much for joining us.*

Regent Perez: Thank you and goodbye.

Joel asked if anyone had any last minute thoughts they would like to offer and Christine Hunefeldt said that it is so mind boggling how dependent we are on the federal government and she wondered what can be done. One idea she put on the table was to stop paying federal taxes, and if everyone in California did this she wondered if it could have a big effect. She added that it is so mind boggling what they are destroying and that she completely agrees with Mr. Perez that money talks, and withholding taxes would be a way of talking.

Joel replied that he found Regent Perez's comments refreshing and although some things he said were predictable, some other things were more provocative and deserve further thought when we reconvene in six months. He thanked the attendees for all the hard work they do on behalf of the University and said that he hoped to see everyone in person at the next meeting on April 29 and 30th at UCLA and will be hybrid in format. Information will be forthcoming. He again thanked UCSF for hosting the meeting.

The meeting adjourned at 11:30 a.m.