

Council of University of California Emeriti Associations  
Council of University of California Retirees Associations  
Joint Meeting  
October 23, 2014  
UC Berkeley

Attending:

UC Berkeley: Ed Epstein, Lola Harris, Patricia Hom, Caroline Kane, Marian Gade, Kurt Lauridsen, Summer Scanlan, Cary Sweeney, Antonia Sweet  
UC Davis: Marjorie Ahl, Susan Barnes, Charles E. Hess, Ted Hillyer, Richard Keller, Deana Falge Pritchard  
UC Irvine: Jeri I. Frederick, Bill Parker, Lyman Porter, Marianne Schnaubelt  
UC Los Angeles: Charles Berst, John Dahl, Adrian Harris, Eddie Murphy, Rod Rose  
UC Riverside: Bob Daly, Anthony Norman  
UC San Diego: Richard Attiyeh, Marjorie Caserio, Marguerite Jackson  
UC San Francisco: Gail Harden, Ernest Newbrun, Sandra Norberg  
UC Santa Barbara: William Ashby, Robert Mann, W. Douglas Morgan  
UC Santa Cruz: Jennifer Anderson, Roger Anderson, Lee Duffus, Michael Nauenberg, Dori Schack, Mary Silver, Marcy Wells  
LBNL: Janis Dairiki, Trudy Forte, Richard Sextro  
LLNL: Jeff Garberson, John Pitts  
UCOP: Kris Lange (Vendor Relations), Ellen Lorenz (RASC), Susan von Seeburg (PARRA), Michael Waldman (RASC), Anne Wolf (Communications)

Call to Order:

Preceding the Call to Order, attendees were welcomed by a lively performance of the California Straw Hat Band.

The meeting was called to order at 9:05 by co-chair Lee Duffus, who extended thanks to the UC Berkeley organizational team. In particular, he recognized Cary Sweeney, the new Director of the UCB Retirement Center.

Campus Welcome:

Angelica M. Stacy, Associate Vice Provost for the Faculty at UC Berkeley, spoke on the topic "The Retirement Landscape in Academia." Key points in her talk were: 1) aging and work in the academy is distinct from other sectors—faculty have an uncommon devotion to their work; 2) the demographics of UC faculty have impacted FTE renewal over time—currently 1/6 of UCB faculty are age 65 or higher, but this is not necessarily a negative; 3) CUCEA and CUCRA are invited to collaborate with UC as it strives to implement a "Path-

way to Retirement Program.” The goal of this new program is “to create options and a smooth pathway to the next phase of your career.”

#### Introductions:

Lee Duffus invited attendees to introduce themselves.

#### Approval of Minutes:

Deanna Falge Pritchard presented the minutes of the May 1, 2014 Joint Meeting at UC Santa Barbara. The minutes were approved as written.

#### UCOP Updates and Responses:

Ellen Lorenz noted that RASC serves 62,000 retirees and 33,000 former employees. Retirement payments amount to \$2.4 billion. As of July 1, 1760 new retirements were processed. According to a recent survey, 82% of RASC’s clients are satisfied or better with the services they have received.

Michael Waldman noted that Open Enrollment takes place October 30 to November 25. There are no plan changes this year, and the vision and legal plans are open for enrollment. Costs of the health care plans are posted on UC Net. The PPO plans, especially the high option plan, have seen premium increases. Michael reminded us that the UC contribution to retiree health plans is decreasing 3% per year (80% this year, 77% next year, to a floor of 70%). The Open Enrollment mailing will go out October 27. CUCRA and CUCEA chairs were invited to review the draft and to suggest changes, some of which have been incorporated. Open Exchange (for retirees with Medicare residing outside California) will be conducting a customer satisfaction survey within a month.

In the spring, RASC conducted a customer satisfaction survey on pre-retirement counseling. The survey went out to 813 individuals, and 350 responses were received. Over 80% of respondents were satisfied or better with the retirement counseling they had received from RASC and with the retirement experience. RASC’s goal was an 80% satisfaction rate, but some in the audience suggested that the goal should be higher in the next survey.

Anne Wolf covered news in retiree communications. Of particular note is that redesign of the website and retirement packets is nearing completion, and that webinar sessions will be added.

Anne announced that, henceforth, one of the terms and conditions in the retirement contract signed by a retiree is that his or her contact information will be released to the campus retiree/emeriti centers. RASC will be working out how efficiently to get this information to the campuses.

Kris Lange gave an update on UC Living Well, the UC wide wellness program. The goal of this program is to “encourage all faculty, staff, and retirees to adopt healthier lifestyles and create and foster a culture of health throughout the system.” The program is multifaceted, including telephonic and online coaching programs, coordination with campus wellness activities and with the medical, dental, vision, behavioral health and financial benefit plans. It includes wellness incentive, which in 2015 will award a \$75 Visa card to those who earn 7500 points through the program’s activities. In 2015 only the employee will be eligible to earn the incentive award, but all are encouraged to participate in the wellness program. The 2014 budget was \$3.9 million, and \$2.7 million was spent. Funding comes from the Office of the President from “credits” derived from the medical plans due to a wellness “carve out.”

Ernie Newbrun recommended that data on mortality and morbidity be tracked to demonstrate the effectiveness of the program.

### “Transforming Retirement,” an Initiative of the Berkeley Retirement Center

Richard Sextro discussed the new initiative of the Berkeley Retirement Center, mentioned earlier by Associate Vice Provost Stacy. This is a research initiative designed to better inform planning for FTE renewal and to ease the transition to retirement. Some key findings to date are: 1) perceptions about retirement differ among faculty and staff; 2) there is a lack of integrated research about retirement; 3) addressing psychosocial factors is important; 4) faculty especially see retirement as “career transition.” A “toolkit” to better prepare for retirement is being developed in the form of a website. Once the website is completed, information will be sent to the CUCRA and CUCEA information officers.

### Joint Benefits Committee Chair’s Comments

Adrian Harris explained that the JBC had not issued a formal report, because information about health care changes was not available in time and because there were “no burning issues.”

Adrian noted that he was circulating two documents: 1) a report on JBC Successful Recommendations; 2) a letter, dated October 23, 2014, addressed to CUCEA/CUCRA officers and representatives from local campuses. The letter, which was the basis of Adrian’s oral remarks, reads as follows:

Dear All,

It is now 20 years since the founding of the JBC and there have been many significant changes in the way CUCEA and CUCRA interact with the Office of the President and other University entities. The Chairs of our two organizations now serve as official members of the UCRS Advisory Board, the CUCEA Chair serves on the Academic Senate University Committee on Faculty Welfare (UCFW), and there is now an informal discussion of issues with Ellen Lorenz and Michael Waldman on a regular and continuing basis. While I have attended meetings of the UCRS Advisory Board since its inception, I no longer have “privilege of the floor,” except during a brief period at the start of the meetings. Input from non-members is not allowed when individual items are being discussed. For the first time in many years, the Chairs were asked to review the contents of the Health Care Open Enrollment Packet, in advance of submissions to the printer. It is a new day!!

On this 20<sup>th</sup> Anniversary, I believe it would be desirable for one of the two Chairs to also serve as Chair of the JBC. That will facilitate communications, which are essential to the functioning of the JBC. Witnessing the deaths of five of our original seven members of the JBC—Adrian Kragen, Eugene Lee, Ralph Nair, Moses Greenfield, and Ad Brugger—and several more former members, including Sheldon Messinger, and very recently, Errol Mauchlan, has influenced me to set a goal of reducing some of my obligations. Therefore, I would like to resign as Chair effective immediately, or as soon as the new Chair is in place.

I was originally appointed to the JBC as a charter representative from CUCRA. Because I firmly believe in the benefits derived from the continuity of membership, I would be willing to continue as a member, should the CUCRA Chair desire. In any event, I will continue to attend CUCRA meetings because I was extended Honorary Council Membership at the end of my sixth year as Chair of CUCRA.

It has been my honor and pleasure to chair the JBC since its inception, and thus to serve both CUCEA and CUCRA through the years. Your continuing support, trust and confidence are indeed gratifying. I do pledge to actively support our University Family in every way possible in the future.

Sincerely,  
Adrian

Following his remarks, Adrian was given a standing ovation.

Roger Anderson noted that the Bylaws state that the JBC chooses its own chair.

## Center Directors' Reports

Because of the late hour, there was no oral presentation, but the written reports were made available.

## Spring 2014 Meeting Preview

Marguerite Jackson distributed a flyer with information about the Spring meetings, which will be held at UC San Diego. CUCEA will meet on the afternoon of April 29; the Joint Meeting will take place on the morning of April 30; and CUCRA will meet on the afternoon of April 30.

## Adjournment:

The meeting was adjourned at 12:10 p.m.

Respectfully submitted,



William J. Ashby  
CUCEA Secretary

First draft: 10/27/14  
2<sup>nd</sup> draft: 11/14/14