

## **Report on Survey of Experience with the Retirement Process (2025 Cohort)**

### **UCSB Emeriti Welfare Committee UCSB Emeriti Association**

**January 30, 2026**

**Distribution:** UCSB Emeriti Association Board; Chancellor Assanis; EVC Marshall; AVC for Academic Personnel Mastro; Senate Divisional Chair Raley; Senate Council on Faculty Welfare Chair Helgeson and Vice Chair Liu; UCSB Retirees Association President Summerfield; UCSB Human Resources AVC & Chief Officer Musto, Director Crawford, Coordinator Pasternack, and Counselor Romero; CUCEA Chair Dimsdale, Chair Elect Joy, and Information Officer Miller.

### **Background**

The Emeriti Welfare Committee (EWC) of the UCSB Emeriti Association surveys recent academic retirees annually on their experience with the retirement process. Our goal is to gather data to support advocacy for improvements in the process for the benefit of both current and future emeriti, and to monitor the effectiveness of the retirement process over time. The annual cohort is defined as those retiring from August 1 through the following July 31 (in fact, most faculty retire on July 1). Reports of our earlier surveys, covering the 2022, 2023, and 2024 cohorts, are available on the Emeriti Association [web site](#).

Here we report survey results for the 2025 cohort, with retirement dates 8/1/2024 – 7/31/2025.

### **Survey and Logistics for 2025 Cohort**

The 2025 cohort survey included questions about overall preparedness for the retirement process; resources used to plan retirement; quality of advice and service received in several areas; ratings of aspects of RASC's performance; and experience with the new policy on return to active duty. Open-ended questions asked for comments on the transition to retirement medical coverage (a perennial trouble point) and for any other comments. A check-box was provided to request an in-person interview by EWC members. Personal contact information was optional. Appendix D lists all the survey questions.

The survey was administered using Google Forms between September 2 and October 15, 2025. The response rate was 56% (27 out of 48), a rate comparable to the 2024 cohort. 21 of the 27 responses included written comments, several lengthy. Two respondents requested interviews with EWC, which were conducted in January 2026. The entire text of the written comments (with identifying information redacted) is in Appendix A. Statistics on the responses to the multiple-choice questions are in Appendix B, and year-to-year comparisons of statistics are in Appendix C.

## Findings from 2025 Cohort

1. **The lack of on-campus advising remains a major problem across several domains (e.g. deadlines, technology, medical coverage, privileges).**
2. **Reports of experience with RASC processing and counseling, while mixed, are markedly more positive than in previous years.**
3. **The transition to retirement medical coverage continues to present significant problems in advising and in execution.**
4. **New policies on recall / return to active duty (RTAD) are not well known to faculty, and seem to have affected only a few respondents to date.**
5. **UCSB should do more, at all levels, to honor retiring faculty and encourage their continued connection with the university.**

## Details of Conclusions from 2025 Cohort

Of the 27 respondents, 21 made written comments on one or both of the open-response questions (on the medical-coverage transition, and any other comments; see Appendix A). Of the 17 “other comments” responses, eight (or 47%) were mostly negative, three (or 18%) were mostly positive, and the others were neutral or mixed. The appendices contain all the written and multiple-choice survey responses (redacted to remove personally identifying information).

Two bottom-line questions about RASC’s outcomes for the 2025 cohort got broadly similar ratings to those for the 2024 cohort: “Accurate implementation of retirement options” had a median rating of “somewhat good”, the same as last year, with “somewhat good/very good” accounting for 78% of respondents. “Timeliness of first pension payment” repeated its median rating of “very good” from last year.

We briefly discuss each of our main findings, and summarize some of the other survey results.

**Lack of on-campus advising.** The complete lack of on-campus retirement advising resources at UCSB has been the largest specific complaint in every cohort EWC has surveyed, since 2022, and the 2025 cohort was no exception. Beginning in fall 2025, the UCSB administration approved a part-time recall position of Retirement Counselor in Human Resources, which will have its first impact on the 2026 cohort next year. Sample quotes from this year:

- What I really needed was one knowledgeable UC rep, preferably on our campus, to be available as my primary guide when trying to apply generalities personally.... The sheer volume of available resources and frequent cross-referencing can seem overwhelming without a dedicated personal guide to lead the way.

- How about giving me access to a human staff person who can answer my questions instead of directing me to FAQs, webinars, and AI assistants?
- I benefited from a 1 on 1 conversation and walk thru with the Assistant Dean of my School academic unit, who generously made her time available though this assistance is not normally part of her duties.
- I often found myself wondering if I was the only pending retiree to have so much trouble trying to find out how general requirements and guidelines affected my particular situation.

**Transition to retirement medical coverage.** Advising for and execution of this transition has been the most widespread concern in every year of the survey. In 2025 we asked specifically for comments on this transition. Of the 15 responses (see Appendix A), 4 reported no difficulties; 6 reported moderate difficulties, often with getting information and erroneous paperwork; and 4 reported significant difficulties, ranging from gaps in coverage to having to change doctors. Quantitatively this is similar to last year, though the 2025 comments give the impression of somewhat fewer outright horror stories than 2024. Sample quotes:

- Our primary care doctor's practice [was] dropped because they do not accept the United Healthcare Medicare plan. We were very disappointed.... Now, we are scrambling to find a new doctor.
- It took ages to get proper dental coverage due I think to a lack of communication between UC and Delta Dental.
- [I needed] clearer answers for COBRA coverage for employees not eligible for retirement health coverage through UC.
- The RASC webinars are critical. Watching them was very important.

**RASC processing and counseling.** Reports of experience with RASC, while still mixed, have improved noticeably over the four survey years. Every multiple-choice survey question about RASC had a higher percentage of “somewhat good” or “very good” responses this year than last, and the medians are equal or higher in every case (see Appendix C). RASC's individual zoom/telephone counseling service was somewhat more widely used this year (“not applicable” responses dropped from 43% to 30%), and while the median overall rating for the counseling service remained “somewhat good”, the percentage of “somewhat/very poor” responses dropped from 24% to 11%. Ease of scheduling for the counseling service rose from a median rating of “somewhat poor” to “somewhat good”, but still elicited some written complaints.

RASC videos and webinars repeated their median rating of “somewhat good” from last year, while the percentage of “somewhat/very good” responses rose from 52% to 81%. The median rating of the UCRAYS portal rose from “somewhat poor” to “somewhat good”, although there were still numerous negative comments about the confusion of multiple web sites. Sample quotes:

- I was unable to make an individual appointment for counseling from RASC early on when researching how to retire.

- Once I established contact with the RASC UC staff, I found working with them to be very helpful. As a whole I was able to reach them periodically by phone on the same day I had an inquiry and I found them very responsive in answering my queries regarding information requested.
- I really struggled at times to confirm my understanding of the 'standard' information I received. My follow-up questions often led nowhere, whether searching online or reaching out to UC reps.
- It is just unbelievable that you demand my responses by fax!

**New RTAD policy.** The 2025 cohort was the first to face a new UC policy requiring that retirees recalled to active duty without a six-month gap in UC employment would need to enroll in employee health insurance during their recall (disenrolling from retiree health insurance and Medicare, if applicable), and then re-enroll in retiree insurance and Medicare afterwards. For details and discussion of possible impacts, see the 2025 reports from the CUCEA/CUCRA Joint Benefits Committee, on the [CUCEA website](#).

Our survey asked whether retirees had arranged a recall appointment, and if so whether they had received timely and accurate information about medical insurance. Only four respondents reported arranging recall appointments. Of those four, two were satisfied with the information they had received, one was somewhat satisfied, and one said it's "too early to tell." This last comment reflects the fact that, as of the survey dates, nobody had yet experienced a complete disenrollment/re-enrollment cycle. Indeed, most faculty did not seem aware of this new policy or what its actual implications were. EWC is considering another survey of the 2025 cohort next year, specifically to follow up on experience with medical insurance. This is an area that needs to be followed closely in future surveys.

**Connection with the university.** Continued connection with UCSB is important to many retiring faculty, and survey comments over the years have complained that neither the campus nor many individual departments sufficiently encourage, assist, or advise for this. The median rating of "advice on emeriti rights and privileges" went from "somewhat poor" in 2024 to "somewhat good" this year. Last year the Emeriti Association added a section on emeriti rights and privileges to its website, which is linked to by both Academic Personnel and the EVC's office; perhaps we should try to publicize this material better. More broadly, there is a perception that UCSB should do more to appreciate both retiring faculty and the continuing academic contributions made by many emeriti; see the CUCEA [Eleventh Campus Report](#) for examples.

- This institution makes no effort to have any acknowledgment of years of service. There were significant retirements during my tenure at UCSB, and I watched as they were completely overlooked, even after incredible international contributions, garnering enormous amounts of extramural funds, and providing many decades of service.
- I will always be extremely proud of my UC association and feel exceptionally grateful for not only my decades of wonderful memories on our campus, but also for the generous UC pension and health benefits at this transitional point of my life. My heartfelt thanks to all who have made that possible.

**Other comments.** Overall impressions of the process were both positive and negative, and included a number of suggestions. Some respondents were concerned about email access and information technology (IT) support. IT and email policies for emeriti and retirees are not uniform across UC campuses, or even across departments at UCSB. We note that the fall 2025 CUCEA/CUCRA Joint Benefits Committee [report](#) recommends to UCOP that guarantees on email access and IT support should be made systemwide policy.

- I found the retirement application process to be very complex to understand.
- Generally I felt that the process was well thought out and executed by staff that care about getting it right for the retiree.
- I lost access to my UCSB email between the separation and retirement dates.... I was waiting for urgent messages, and had not been informed that I would be unable to check my email during this period.
- I could not find information on what my IT privileges would be, most importantly, how long I will be able to keep my UCSB email address.
- It would be useful to have information/counseling about pension/tax/medical plan implications for anyone considering [moving overseas].

**In-person interviews.** EWC conducted interviews with the two respondents who requested them. The interviews were quite helpful, both in providing depth to issues already identified in the survey and in raising new issues. One such new issue is coordination between RASC and CalPERS for someone who retires from UC after a career that has included other service as a California state employee, e.g. at Cal State. Coordination of service and retirement dates had a significant effect on eligibility for retirement medical benefits; the respondent reported that CalPERS staff understood the issues and process but RASC staff did not. Possibly, future surveys should ask about issues encountered in coordinating California state retirement plans.

One respondent spoke about the desire to maintain connections with UCSB research initiatives, and the possibility that the Emeriti Association might become involved with this.

Both interviews reported situations in which a retiree was on the brink (or worse) of a bad experience with the retirement process, and was helped by having or finding a personal connection at UCSB who could provide knowledge and advice. This could be an avenue for exploration on future surveys.

A few quotes from the interviews:

- Bottom line was, the process worked.
- RASC webinars had so much information that it was hard to have a good understanding of it in a working way.
- Personal support [from an unofficial UCSB administrative connection] was very important to me; it reduced my anxiety to know that somebody had my back.

**Plan for 2026 cohort survey.**

EWC plans to survey the 2026 cohort next fall quarter. We will repeat most of the current survey questions to build data on year-to-year trends. A significant development for the 2026 cohort is UCSB's establishment in fall 2025 of an on-campus Retirement Counselor position; we will seek feedback on that program. As always, the Emeriti Association will monitor other developments on campus and at RASC, and adjust the survey as necessary to evaluate their impacts.

Respectfully submitted,  
UCSB Emeriti Welfare Committee:

William Ashby  
Denise Bielby  
Cynthia Brown (ex officio)  
John Gilbert (Chair)  
Cynthia Stohl  
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## Appendix A: Complete written comments from 2025 cohort (redacted)

Did you experience any difficulty with continuing medical coverage (whether related to an RTAD or not)? If so, please describe.

**RESPONSE 1:** a bit unclear; need for medicare A and B was not clear

**RESPONSE 5:** No

**RESPONSE 6:** I still don't know what my mid-level benefit premium will be.

**RESPONSE 7:** no

**RESPONSE 9:** no

**RESPONSE 10:** It was not clear to me that separating June 27 and retiring July 1 meant that my employee health care continued through July, and my retiree health care began August 1.

**RESPONSE 11:** some of my [spouse]'s forms were not implemented in a timely fashion

**RESPONSE 12:** No. The RASC webinars are critical. Watching them was very important.

**RESPONSE 13:** Our primary care doctor's practice (my [spouse] and I) were dropped because they do not accept the United Healthcare Medicare plan. We were very disappointed because we had been with that physician for all of our nine years in Santa Barbara and we really liked this doctor. Now, we are scrambling to find a new doctor.

**RESPONSE 15:** Yes. Attending RASC webinars and reading RASC online information about the transition to retirement health plans (linked to Medicare) and the options available gave me a good sense of what to expect. However, the RASC information was not clear or precise enough on (a) the exact sequence of steps, forms (UC forms and government forms) needed to implement health benefits decisions; (b) the exact timeline for how and when the transition to Medicare + retirement health benefits kicked in; and (c) what to expect in terms of changes in medical plan cards, how providers handle insurance issues, etc. (E.g., I did not know what health insurance/benefits/medicare card to provide a drugstore during the month after retiring for drugs as the transition to retirement health benefits was occurring.)

**RESPONSE 17:** Further clarification about transition to United Health Care Plan from UC Health Net and connections to Medicaid coverage could have been easier to follow. All has worked out smoothly, but at first I was confused.

**RESPONSE 19:** Yes, I did not meet the 10 year requirement and do not have a UC supplement

**RESPONSE 21:** Too early to tell since I don't return until winter 2026. I have sent questions to my department and beyond but have not yet received confirmation of my personal situation.

**RESPONSE 22:** I got confusing answers about COBRA for my husband from UCSB HR and RASC. I ended up counting on receiving the enrollment packet from Wex eventually (which I did)

**RESPONSE 25:** Yes. Due to retiring before age 65, I needed COBRA to tide me over until Medicare. I was at UCSB less than a decade so was not entitled to continue UCSB coverage through the university. I got caught in many CATCH 22 situations of people who didn't know what the procedure was between being full time and going on COBRA. They only knew how to transition those who were continuing medical coverage through UCSB. This is an area for improvement in training. Everyone shifted me to a different department.

Please make any other comments about your experience with the retirement process. For example: what went well, what could have gone better, what suggestions do you have, any specific stories you'd like to tell.

**RESPONSE 1:** How about giving me access to a human staff person who can answer my questions instead of directing me to faqs, webinars, and AI assistants?

**RESPONSE 2:** It is just UNBELIEVABLE that you demand my responses by Fax! Yes, that's right: Fax, even though that ceased to be used 30 years ago. Needless to say, this absurd requirement made the whole experience a nightmare, with response times measured in weeks each time I wanted to inquire something. I wonder why, and the only thing I can think of is "make it as difficult and absurd as possible, so as to delay and delay and delay."  
What a shame!

**RESPONSE 4:** I had not access to my UCSB email between my separation and my retirement dates. It was extremely unpleasant especially because I had not been informed about this at all. It came as a shock, I did not know what happened, and was waiting for important messages at that time.

**RESPONSE 6:** Generally I felt that the process was well thought out and executed by staff that care about getting it right for the retiree. I believe that my timing was a little tricky because it coincided with some policy change on retirement benefits for recall employees. I expect that they will figure this stuff out pretty fast.

**RESPONSE 7:** The main problem I had is minor compared to the larger issues which were well covered and overall the process of retiring and getting my first retirement check was easy enough. But I could not find information on what my IT privileges would continue to be, most importantly to me, how long I will be able to keep my UC email address. I was dropped immediately from being able to log into egrades, CANVAS, Zoom etc. after my retirement date. There was no warning that this would happen. That was annoying because I still rely on these sites for information I need to write letters of rec for my former students. I also found no information on how long my UC-licensed Office and Adobe would work. The only information I was able to find was that I could restore library privileges with my retiree ID. When I got in contact with ITHelp, they referred me to my Department who is still trying to figure this out. I also could not find information on the difference between getting an academic affiliation to extend some of these privileges, versus getting emeritus status and what benefits that would entail. More than two months after my retirement date all these issues still are pending.

To conclude, this may be a minor issue, but one that most retirees might be interested in and I feel it should be easy to address front and center on some relevant accessible website.

**RESPONSE 9:** I did not prepare myself well but the service I received was all very good and helpful.

**RESPONSE 11:** The health care information remains unclear

**RESPONSE 12:** Attend all webinars! I attended 5, and I think one was a repeat. Plus, I downloaded the presentations for later review.

**RESPONSE 15:** I was unable to make an individual appointment for counseling from RASC early on when researching how to retire; and at that time I also could not arrange for individual counseling at my campus (UCSB). Early individual counseling would have much streamlined my learning process about retirement and prevented some confusion.

**RESPONSE 16:** I lost access to my UCSB email between the separation and the retirement dates. It was very upsetting because I was waiting for urgent messages, and had not been informed at all that I would be unable to check my mail during this period.

**RESPONSE 17:** I found the retirement application process to be very complex to understand. I benefited from a 1 on 1 conversation and walk thru with the Assistant Dean of my School academic unit who generously made her time available though this assistance is not normally part of her duties. I did reach out to our designated campus retirement health advisor and this person was also very helpful and responded in a timely manner. Finally, and perhaps most importantly, once I established contact with the RASC UC staff, I found working with them to be very helpful. As a whole I was able to reach them periodically by phone on the same day I had an inquiry and I found them very responsive in answering my queries regarding information requested on forms and also detailed tracking of my progress in completing all necessary steps satisfactorily within necessary deadlines to retire as scheduled with no delays in starting retirement, health coverage, and receipt of retirement salary payments.

**RESPONSE 18:** Separate from the financial element of retirement, it is critical to note that this institution makes no effort to have any acknowledgment of years of service. There were significant retirements during my tenure at UCSB, and I watched as they were completely overlooked, even after incredible international contributions, garnering enormous amounts of extramural funds, and providing many decades of service. A colleague who retired this past year threw their own party, as it became obvious that no one take any steps to do the minimal appreciation for their work, role, and contributions over the years. Typically the chancellor sends out an email when past or present faculty pass away, but between many years of work and death, there seems to be no effort. There was one single notice that went out this past week from Academic Personnel and they expressed that they lacked a systematic way of tracking retirements as the reason why they don't have an accurate list and may have missed some names (and in fact, DID miss people's names!). That is an extremely low standard for an institution and shows an incredible lack of care for its "community," who typically pour decades of time and effort into the success of the institution.

**RESPONSE 19:** RASC staff were overall incompetent and failed to file my paperwork properly delaying my annuity payment by three months. I received by CALpers payment that was delayed due to RASC incompetence.

**RESPONSE 20:** In this time of domestic uncertainty, with some Emeriti contemplating moves overseas, it would be useful to have information/counseling about pension/tax/medical plan implications for anyone considering such a move.

**RESPONSE 21:** Although I eventually found answers to most of my questions throughout the retirement process, I really struggled at times to confirm my understanding of the 'standard' information I received. My follow-up questions often led nowhere, whether searching online or reaching out to UC reps. I often found myself wondering if I was the only pending retiree to have so much trouble trying to find out how general requirements and guidelines affected my particular situation, which was complicated by the fact that I had a long-term joint appointment in two departments. Throughout the entire retirement process, which I began two years in advance, I felt like I desperately needed a qualified UC representative to focus on my specific situation so that I could make decisions with better understanding and confidence.

As one example of the above, I reached out numerous times trying to find out which 'separation' day (prior to my July 1 retirement) would benefit me the most. Each time, I was told that it didn't really matter as long as there was a non-working day in between the two dates. Unfortunately, I later learned that the choice of separation day does actually matter. I ended up running multiple pension estimates to see how each different separation day affected my monthly pension payment. I unexpectedly found one particular day, several days earlier than the others, that resulted in more than \$100/month increase in my estimated pension, which was indeed the pension amount I eventually received. However, I later learned that I had unknowingly reduced my final paycheck, prior to retirement, by ~\$500 by choosing the earlier separation day. Thus, my choice of separation day ended up mattering in two meaningful ways, yet no one had helped me review my particular situation -- or made related suggestions -- that could have saved me considerable time and prevented future surprises based on my uninformed

choices (simply my best guesses at the time).

Another particularly personal example was my failed attempt to find out each of the three HAPC salary totals used to calculate my pension. My dual appointment resulted in numerous paycheck problems, especially during my final two years before retirement. My paychecks were frequently off (by up to several thousand dollars), eventually leading to a union grievance on my behalf since no one on campus could effectively resolve the issue. As such, I started to worry about how these incorrect paychecks could affect my pension. I began a months-long process, reaching out to a dozen people on-campus and off-, to confirm the three specific HAPC amounts used to calculate my pension. I simply wanted to verify that my annual salary amounts were correct. In the end, after numerous emails and messages, I was never able to confirm the three annual HAPC amounts used, and I still wonder sometimes if my final pension is correct. I just have to trust the system.

The point of the above examples is that I found myself struggling at times when trying to apply standard information to my own specific situation. The solution? What I really needed was one knowledgeable UC rep, preferably on our campus, to be available as my primary guide when trying to apply generalities personally. Trying to locate information from numerous UC websites, attend webinars, contact various people on our campus, and reach out to UCRAYS reps via messaging/Zoom was challenging, especially while trying to complete my own UC work during the particularly busy final year of my 30-year career.

I do understand that my joint appointment issues aren't typical for most prospective retirees, but I suspect that a personally assigned retirement specialist, one-on-one, would still prove quite helpful for them as well. In the end, after receiving help from numerous staff and colleagues, things do seem to have worked out well for me -- I experienced no lapse in my paychecks and my healthcare arrangements for my [spouse] and me transferred seamlessly. I am very thankful for that. Looking back, I just wish the retirement process had been considerably more concise and better supported for each individual's needs. I noticed some UC attempts to do that, including some helpful step-by-step online resources and prompt UCRAYS messaging, but the sheer volume of available resources and frequent cross-referencing can seem overwhelming without a dedicated personal guide to lead the way.

Thank you for reaching out to me for my thoughts in this survey -- and for taking time to read them! That alone signals to me that the complex UC retirement system will continue evolving to meet UC employees' needs. Looking ahead, I will always be extremely proud of my UC association and feel exceptionally grateful for not only my decades of wonderful memories on our campus, but also for the generous UC pension and health benefits at this transitional point of my life. My heartfelt thanks to all who have made that possible.

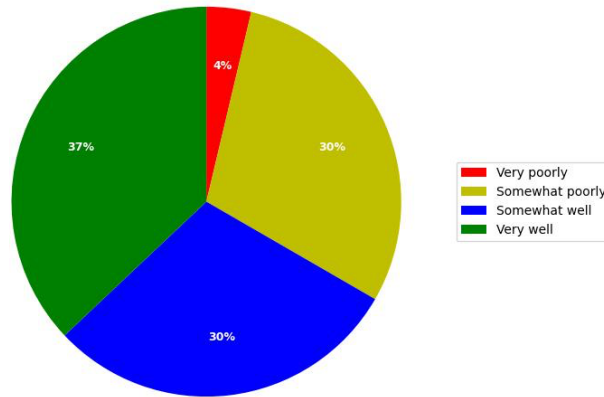
**RESPONSE 22:** See above re clearer answers for COBRA coverage for employees not eligible for retirement health coverage through UC.

**RESPONSE 27:** It took ages to get proper dental coverage due I think to a lack of communication between UC and Delta Dental.

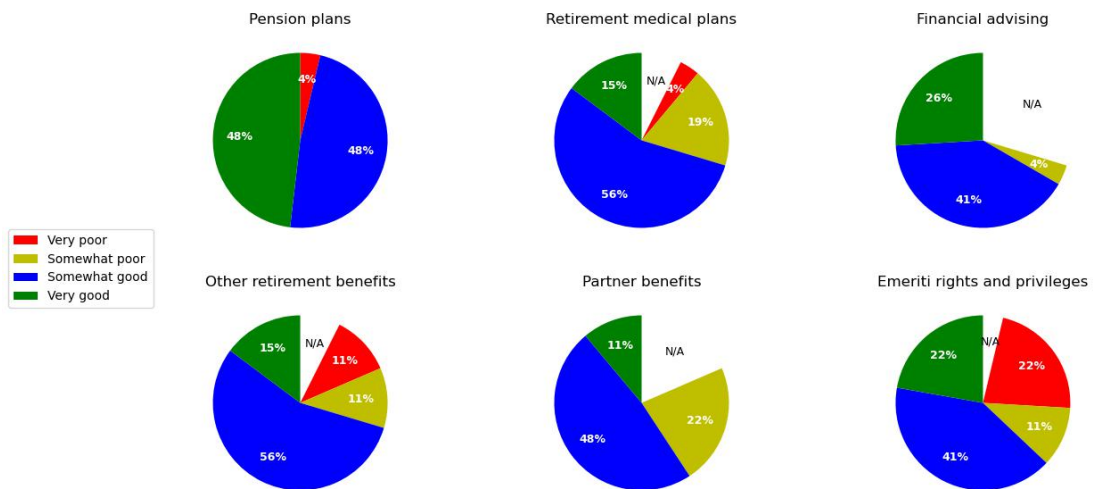
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## Appendix B: Multiple-choice questions from 2025 cohort

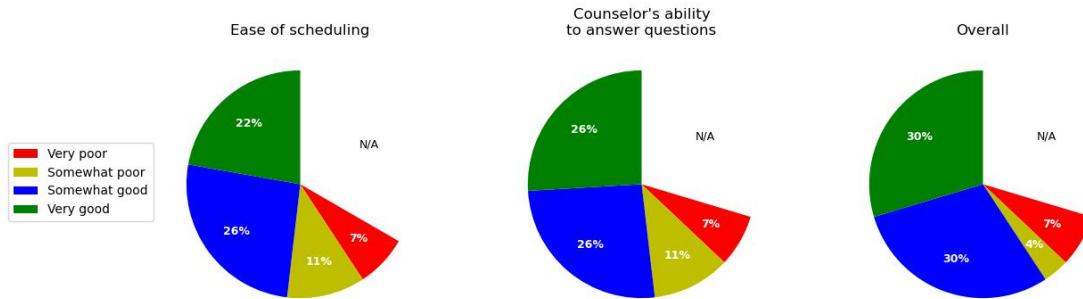
How well were you prepared for your retirement process?



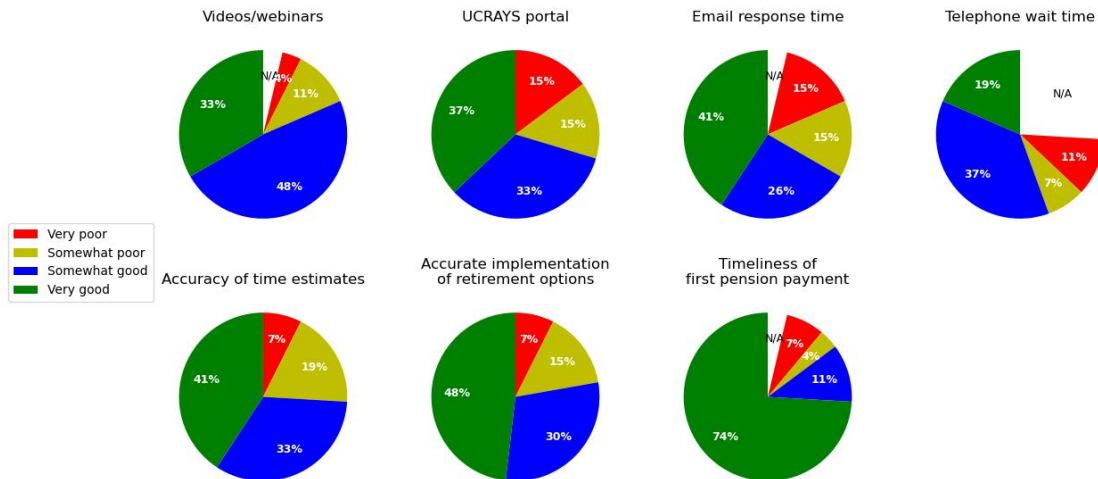
Rate the quality of advice and service you received:



## Rate these aspects of RASC's individual counseling:



## Rate the following RASC services:



Appendix C: Year-to-year comparison of responses (2025)

=====  
Medians omit "n/a" responses.  
"good" combines "very good" and "somewhat good".  
"poor" combines "very poor" and "somewhat poor".  
=====

Prepared for retirement process: How well were you prepared?  
2025 cohort: Median: Somewhat well; 67% good, 33% poor, 0% n/a  
2024 cohort: Median: Somewhat well; 62% good, 38% poor, 0% n/a  
2022-23 cohort: Median: Somewhat well; 64% good, 36% poor, 0% n/a

Quality of advice and service: Pension plans  
2025 cohort: Median: Somewhat good; 96% good, 4% poor, 0% n/a  
2024 cohort: Median: Somewhat good; 90% good, 5% poor, 5% n/a  
2022-23 cohort: Median: Somewhat good; 64% good, 36% poor, 0% n/a

Quality of advice and service: Retirement medical plans  
2025 cohort: Median: Somewhat good; 70% good, 22% poor, 7% n/a  
2024 cohort: Median: Somewhat poor; 43% good, 57% poor, 0% n/a  
2022-23 cohort: Median: Somewhat good; 55% good, 36% poor, 9% n/a

Quality of advice and service: Financial advising  
2025 cohort: Median: Somewhat good; 67% good, 4% poor, 30% n/a  
2024 cohort: Median: Somewhat good; 43% good, 24% poor, 33% n/a  
2022-23 cohort: Median: Somewhat good; 36% good, 18% poor, 45% n/a

Quality of advice and service: Other retirement benefits  
2025 cohort: Median: Somewhat good; 70% good, 22% poor, 7% n/a  
2024 cohort: Median: Somewhat good; 48% good, 38% poor, 14% n/a  
2022-23 cohort: Median: Somewhat poor/Somewhat good; 45% good, 45% poor, 9% n/a

Quality of advice and service: Partner benefits  
2025 cohort: Median: Somewhat good; 59% good, 22% poor, 19% n/a  
2024 cohort: Median: Somewhat good; 43% good, 14% poor, 43% n/a  
2022-23 cohort: Median: Somewhat poor; 36% good, 45% poor, 18% n/a

Quality of advice and service: Emeriti rights and privileges  
2025 cohort: Median: Somewhat good; 63% good, 33% poor, 4% n/a  
2024 cohort: Median: Somewhat poor; 38% good, 57% poor, 5% n/a  
2022-23 cohort: Median: Somewhat poor/Somewhat good; 45% good, 45% poor, 9% n/a

RASC individual counseling: Ease of scheduling  
2025 cohort: Median: Somewhat good; 48% good, 19% poor, 33% n/a  
2024 cohort: Median: Somewhat poor; 24% good, 24% poor, 52% n/a

RASC individual counseling: Counselor's ability to answer questions  
2025 cohort: Median: Somewhat good; 52% good, 19% poor, 30% n/a  
2024 cohort: Median: Somewhat good; 38% good, 24% poor, 38% n/a  
2022-23 cohort: Median: Somewhat poor; 36% good, 45% poor, 18% n/a

RASC individual counseling: Overall  
2025 cohort: Median: Somewhat good; 59% good, 11% poor, 30% n/a  
2024 cohort: Median: Somewhat good; 33% good, 24% poor, 43% n/a

General RASC services: Videos/webinars  
2025 cohort: Median: Somewhat good; 81% good, 15% poor, 4% n/a  
2024 cohort: Median: Somewhat good; 52% good, 43% poor, 5% n/a

General RASC services: UCRAYS portal  
2025 cohort: Median: Somewhat good; 70% good, 30% poor, 0% n/a  
2024 cohort: Median: Somewhat poor; 33% good, 62% poor, 5% n/a  
2022-23 cohort: Median: Somewhat poor; 45% good, 55% poor, 0% n/a

General RASC services: Email response time  
2025 cohort: Median: Somewhat good; 67% good, 30% poor, 4% n/a  
2024 cohort: Median: Somewhat good; 48% good, 43% poor, 10% n/a  
2022-23 cohort: Median: Very poor; 9% good, 82% poor, 9% n/a

General RASC services: Telephone wait time  
2025 cohort: Median: Somewhat good; 56% good, 19% poor, 26% n/a  
2024 cohort: Median: Somewhat good; 38% good, 33% poor, 29% n/a  
2022-23 cohort: Median: Very poor; 0% good, 73% poor, 27% n/a

General RASC services: Accuracy of time estimates  
2025 cohort: Median: Somewhat good; 74% good, 26% poor, 0% n/a  
2024 cohort: Median: Somewhat good; 48% good, 43% poor, 10% n/a  
2022-23 cohort: Median: Somewhat good; 55% good, 36% poor, 9% n/a

General RASC services: Accurate implementation of retirement options  
2025 cohort: Median: Somewhat good; 78% good, 22% poor, 0% n/a  
2024 cohort: Median: Somewhat good; 52% good, 48% poor, 0% n/a  
2022-23 cohort: Median: Somewhat good; 73% good, 27% poor, 0% n/a

General RASC services: Timeliness of first pension payment  
2025 cohort: Median: Very good; 85% good, 11% poor, 4% n/a  
2024 cohort: Median: Very good; 76% good, 24% poor, 0% n/a  
2022-23 cohort: Median: Very good; 82% good, 18% poor, 0% n/a

Recall appointment / RTAD  
2025 cohort: 15% yes, 85% no

Interview  
2025 cohort: 7% yes, 93% no  
2024 cohort: 24% yes, 76% no  
2022-23 cohort: 45% yes, 55% no



# Survey of Experience with the Retirement Process

The UCSB Emeriti Welfare Committee (EWC) is surveying recent retirees on their experiences with the retirement process. Our goal is to gather data to support advocacy for improvements in the process for the benefit of both current and future emeriti. We repeat the survey with each new annual cohort of emeriti, in order to monitor the effectiveness of the retirement process over time.

The EWC is a committee of the [UCSB Emeriti Association](#), which consists of retired Senate faculty and other academic retirees, and their spouses and domestic partners.

Your name and contact information are optional on the survey. Names and other personally identifying information will not be shared beyond the EWC, the Emeriti Association Board, and its staff. If you would like to be interviewed on your experience with the retirement process, please so indicate below.

Please complete the survey as promptly as possible, and in any case no later than October 15, 2025.

Thank you for taking the time to complete the survey.

- John Gilbert, Chair, UCSB Emeriti Welfare Committee (gilbert@cs.ucsb.edu)
- Muriel Zimmerman, President, UCSB Emeriti Association (mzimmer@ucsb.edu)

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\* Indicates required question

1. Name (optional):

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2. Email (optional):

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3. When did you join UCSB (year)? \*

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4. When did you retire from UCSB (month/year)? \*

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5. What was your final title at UCSB? \*

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6. How well do you feel you were prepared for your retirement process? \*

*Mark only one oval.*

Very poorly

Somewhat poorly

Somewhat well

Very well

7. What resources did you use to plan your UCSB retirement? (Check all that apply) \*

*Check all that apply.*

- UC web sites: RASC, UCRAYS, [myuc retirement.com](http://myuc retirement.com)
- RASC retirement planning webinars
- RASC individual counseling service
- UCSB Human Resources
- Your UCSB department
- Fidelity Investments
- Your own financial advisor
- Social Security Administration or Medicare
- Other: \_\_\_\_\_

8. How would you rate the **quality of the advice and service** you received in each of the following areas: \*

*Mark only one oval per row.*

	Not applicable	Very poor	Somewhat poor	Somewhat good	Very good
<b>Pension plans</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Retirement medical plans</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Financial advising</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Other retirement benefits</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Spousal/domestic partner benefits and medical coverage</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Rights and privileges of emeriti</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

9. How would you rate **RASC's individual counseling**: \*

*Mark only one oval per row.*

	Not applicable	Very poor	Somewhat poor	Somewhat good	Very good
<b>Ease of scheduling counseling sessions</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Ability of counselor to answer your questions</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Overall rating for RASC individual counseling</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

10. How would you rate these **general RASC services**: \*

*Mark only one oval per row.*

	Not applicable	Very poor	Somewhat poor	Somewhat good	Very good
<b>Usefulness and accuracy of RASC videos/webinars</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Ease of use of UCRAYS portal</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Response time to email messages</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Telephone wait time</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Accuracy of time estimates of steps of the retirement process</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Accurate implementation of your chosen retirement options</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
<b>Timeliness of your first pension payment</b>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

11. Did you negotiate a recall appointment / return to active duty (RTAD)? \*

Mark only one oval.

Yes

No

12. If you answered "Yes" above, did you receive timely and accurate information about continuing medical insurance?

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13. Did you experience any difficulty with continuing medical coverage (whether related to an RTAD or not)? If so, please describe.

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14. Please make any other comments about your experience with the retirement process. For example: what went well, what could have gone better, what suggestions do you have, any specific stories you'd like to tell.

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15. If you would like to be interviewed by a member of the Emeriti Welfare Committee, please check:

*Check all that apply.*

Yes

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