

CUCRA
SURVEY II STATUS
UPDATE

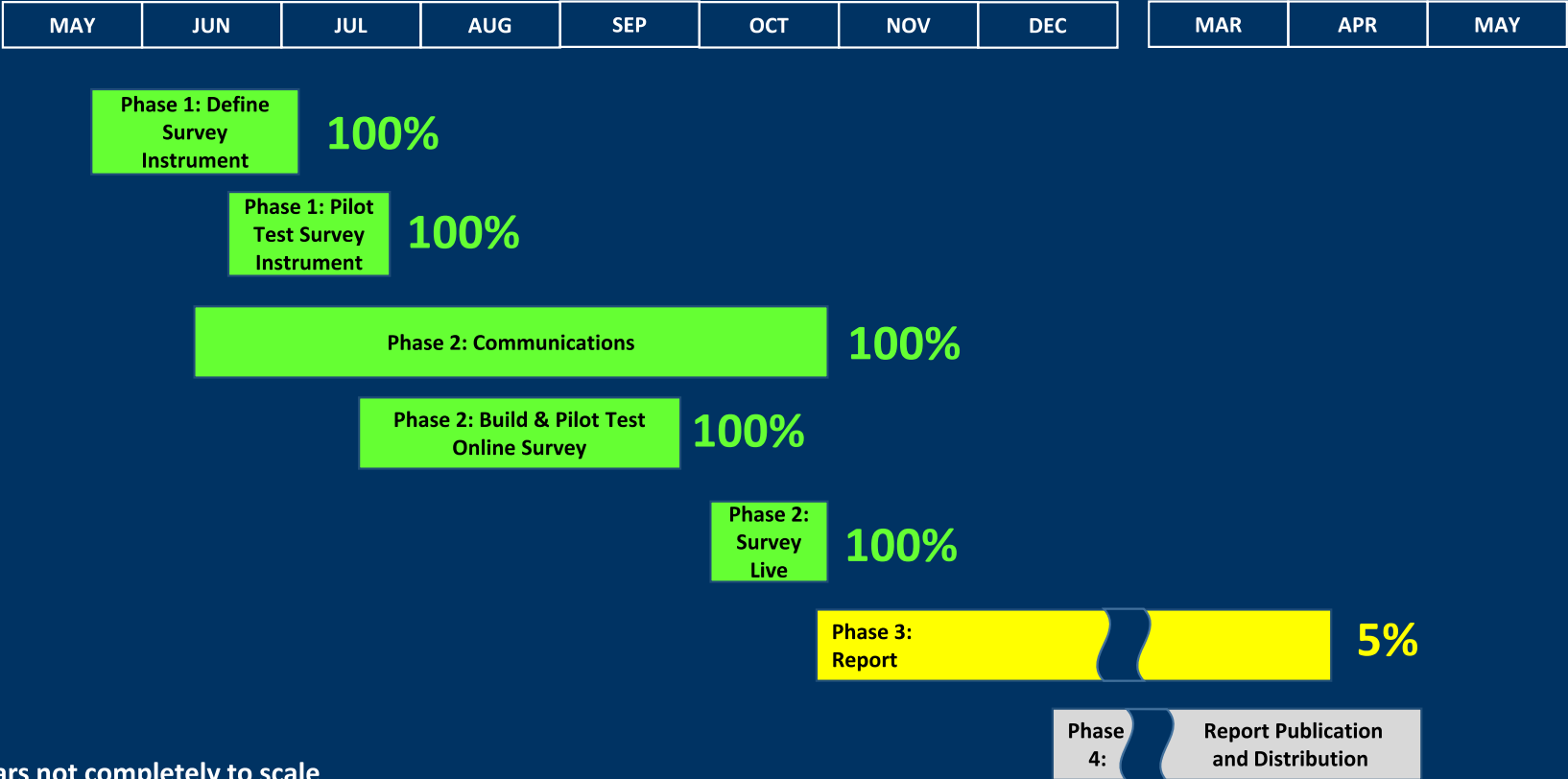
10/29/2020

Survey Task Group Roster

Name	Location	Affiliation
Mark Appelbaum	San Diego	Emeritus
Nancy Brown	LBNL	Retiree
Sandy Camp	Santa Barbara	Retiree
Christy Dawley	Santa Cruz	Retirement Center
Ayesha Dixon	Los Angeles	Retirement Center
Lee Duffus	Santa Cruz	Retiree
Russell Fitzgerald	San Francisco	Retiree

Name	Location	Affiliation
Jeri Frederick	Irvine	Retirement Center
Jon Good	UCOP	Retiree
Margaret Johnson	Los Angeles	Retiree
Ilse Lopes	Santa Cruz	Retiree
Cristina Otegui	Riverside	Retirement Center
Anne Pautler	Los Angeles	Retiree
Kyle Urban	Davis	Retirement Center

Timeline



Note: Time bars not completely to scale

Shout Outs (It Takes a Great Team...)

- To the Survey Champions and their partners:
 - For getting the message out in many different and creative ways
 - For submitting 75+ messaging artifacts useful to current analysis of submission activity and to analysis for effective communications in the future
- To the Survey Task Group:
 - For the great collaboration to date

Survey II by the Numbers

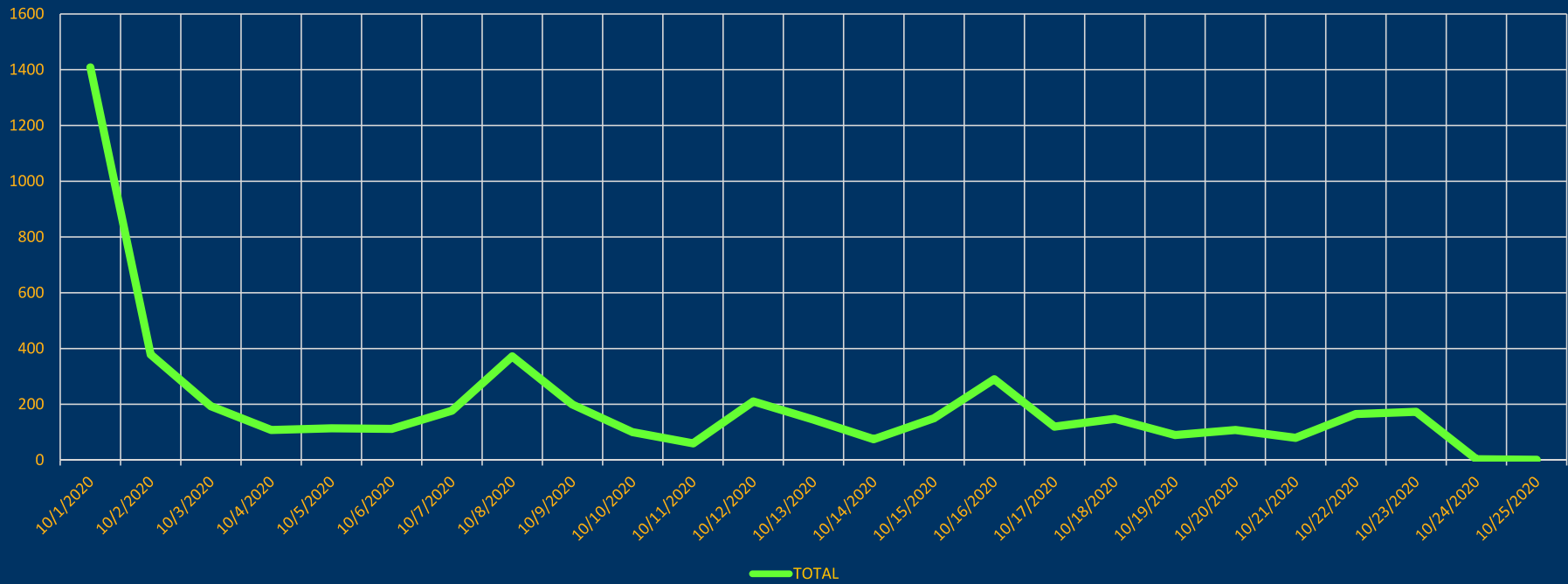
- Base Survey: 25 Questions on all submissions
- Local Survey Add-ons: 1-4 questions each from 6 different centers
- Survey Open 23 Days: 10/1-10/23/2020 (Survey I was open 4+ weeks)
- Baseline Audience Size: 21,967 retirees for whom email addresses were available
- 4,980 Submissions (completed surveys)
 - 4,662 Staff and Non-Senate Academic
 - 318 Emeriti
- 170 abandoned surveys (started but not completed)
- 2,664 Gift Card Drawing Entries

Submissions by Location

Location	Baseline (Audience Size)	2020 Submission Count	2020 % of Baseline	2020 as % of 2016	2016 Submission Count
UC Berkeley	3,154	801	25.40%	115.42%	694
UC Davis	4,500	1,009	22.42%	112.49%	897
UC Irvine	3,306	542	16.39%	152.68%	355
UCLA	3,300	981	29.73%	157.72%	622
UC Merced	79	31	39.24%	3100.00%	1
UC Riverside	390	78	20.00%	159.18%	49
UC San Diego	2,365	276	11.67%	92.00%	300
UC San Francisco	1,054	345	32.73%	126.84%	272
UC Santa Barbara	1,030	189	18.35%	60.00%	315
UC Santa Cruz	900	230	25.56%	136.90%	168
UCOP/Regents	563	160	28.42%	90.40%	177
Lawrence Berkeley NL	926	270	29.16%	109.31%	247
Lawrence Livermore NL	400	64	16.00%	18.82%	340
Los Alamos NL		4		57.14%	7
TOTAL	21,967	4,980	22.67%	112.06%	4,444

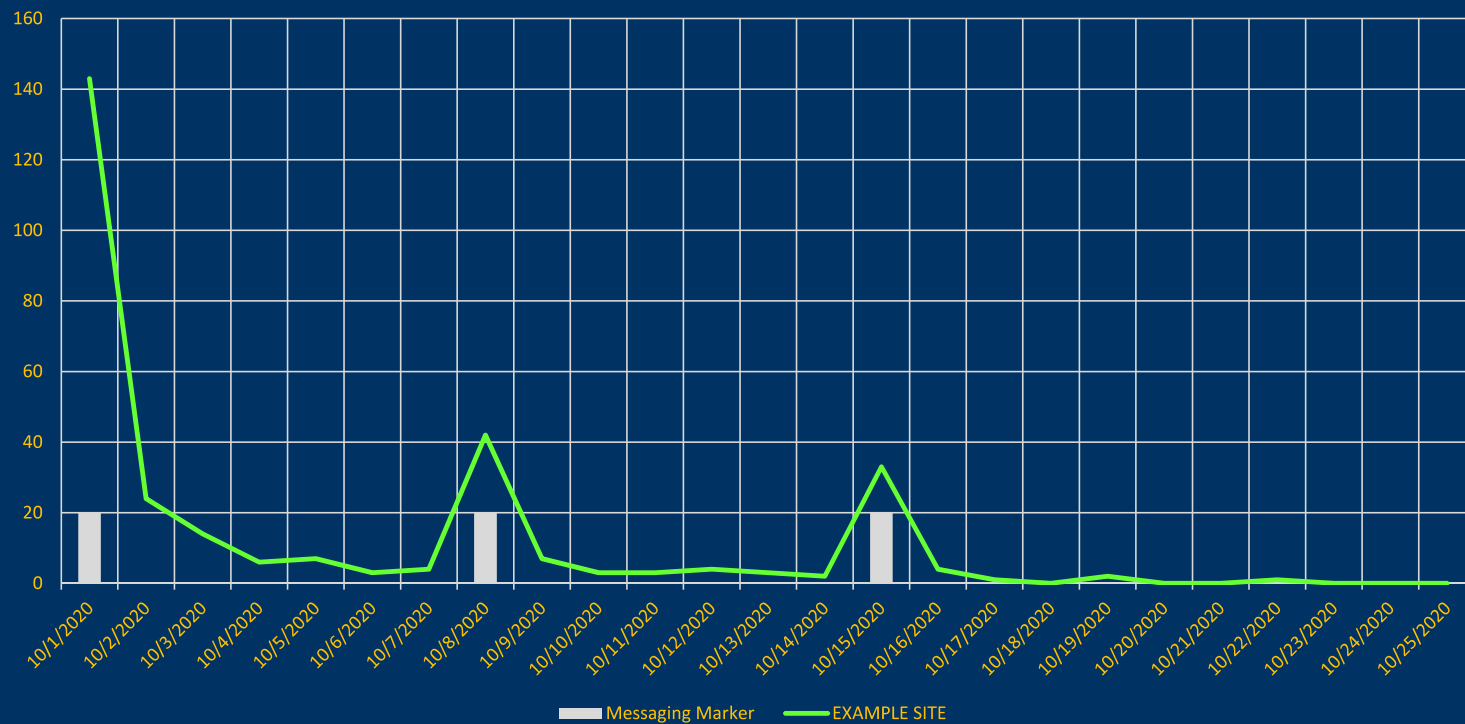
Daily Survey Submission Activity

CUCRA 2020 Survey - Total Submissions by Day - 10/1/2020-10/25/2020



Example of Daily Submissions and Messaging Relationship

CUCRA 2020 Survey - EXAMPLE SITE Submissions by Day - 10/1/2020-10/25/2020



Immediate Follow-up to Phase 2

- Share Charts of Daily Submissions by Location and Relationship to Messaging with Survey Champions and Center Directors
- Requests to Survey Champions:
 - Feedback on Communications Plan
 - Survey Problem Reports (if any)
- Deliver Gift Cards to Drawing Winners (drawing held in 10/27/2020 Survey Task Group meeting)

What's Next?

- Phase 3: Report (just getting underway)
 - Validate Data
 - **Base Survey Data Embargoed Until Report Publication – April 2021**
 - Distribute Responses to Local Questions in next 1-3 weeks
 - Analyze Quantitative Data
 - Analyze Qualitative Data (Questions 16-18)
 - Write Report
- Phase 4: Report Publication and Distribution
 - Prepare Print-Ready Report
 - Print Report
 - Prepare Communications Tools
 - Publish & Distribute Report and Communications Tools

Requests to Associations

1. *Financial Data - UC retiree's financial contributions to the University*

- Request sent to Association Presidents 9/30/2020
- DEADLINE: December 15, 2020

2. *Digital images of retiree activities*

- Requests made to CUCRA members in May and in 6/25/2020 meeting
- Detailed request and submission instructions will be sent to Survey Champions soon
- DEADLINE: February 28, 2021 (but sooner *IS* better)

Thank You for Your Attention

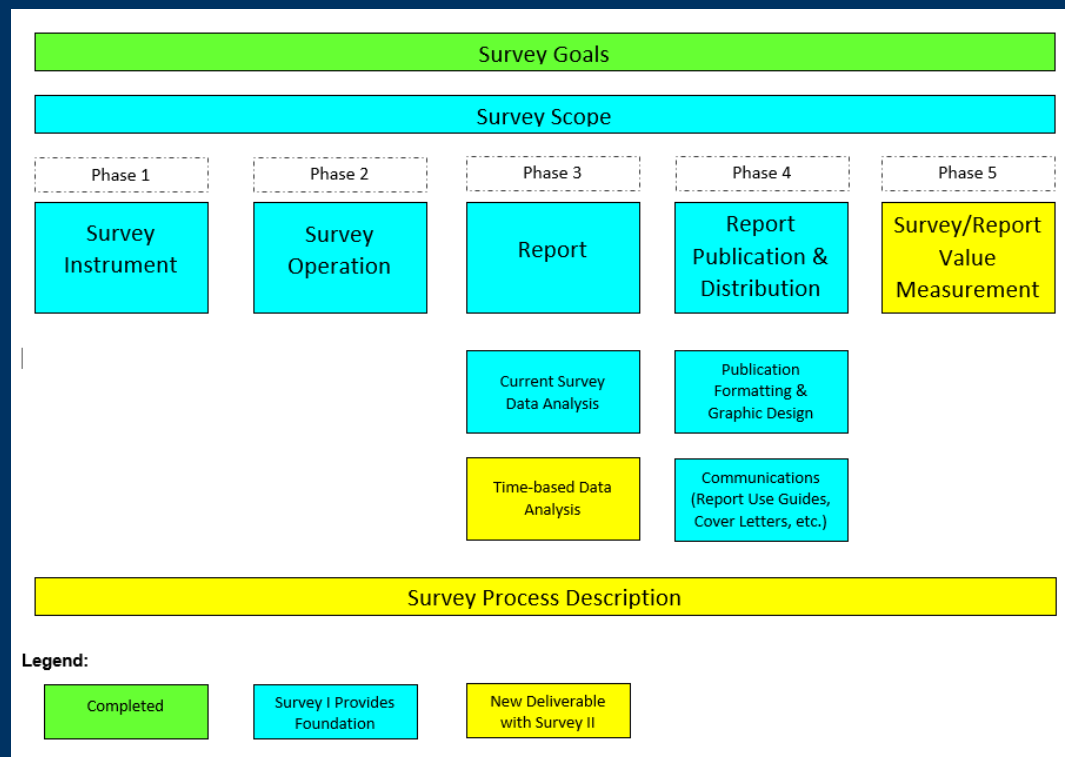
Jon Good

Email: cucra.s2pm@gmail.com

Survey Goals

- Enable CUCRA, its member retirees associations, and retiree centers to advocate more effectively on behalf of UC retirees.
- Help the UC President's Office and campus and laboratory administrators better understand the contributions made by retirees to UC and the broader community.
- Assist UC retirees associations and retiree centers create and improve upon programs for retirees.
- Provide retirees with comprehensive information about their collective contributions and achievements.

Project Phases and Deliverables



Survey Instrument

- Evolutionary approach: maintain ability to compare with Survey I
- Principles:
 - Consistent with survey goals, limit questions to those of relevance to the final report, or of value to retiree associations and retirement centers
 - Keep wording of questions as short as possible
 - Place engaging questions at the start of the survey
 - Make questions and responses flow quickly (click-click-click)
 - Keep survey time-to-complete to under 15 minutes
- Started with suggested questionnaire from Survey I team
- Pared questionnaire down from 32 to 25 questions; made more concise
- 6 Retirement Centers each asked 1-4 local questions