

## Council of University of California Retiree Associations (CUCRA)

---

*Executive Committee*  
*John Meyer (UCD), Chair*  
*Sue Abeles (UCLA), Vice Chair*  
*Patti Owen, (UCB) Secretary*  
*John Dahl (UCLA), Treasurer*  
*Bob Daly (UCR), Information Officer*  
*Marianne Schnaubelt (UCI), Past Chair*

*April 19, 2023*

### An Update to Our Membership: April 2023

*From John Meyer, Chair, CUCRA*

#### **BETWEEN US: MAY I RANT FOR A BIT?**

On behalf of the CUCRA Executive Committee, I offer this summary of issues being addressed by the association. For those who have seen the movie *Groundhog's Day*, you'll recall that the main character wakes up each morning only to find himself in a time loop repeating the same things each day until he gets it right. That is how I am feeling with our efforts to advocate for improvement in the processing of benefits for both new and existing retirees, although I'm still awaiting the "get it right" happy ending. Over the last several years, the processing issues of the Retirement Administration Service Center (RASC) have cascaded over all our other priorities. When retirees understandably get frustrated with long call center wait times, they then contact their local retiree center or association representatives. While these entities do all they can to help, they often do not have access to information or data systems to resolve an issue.

This is disheartening for the retirees but also retiree centers whose workload has been overwhelmed by this unanticipated demand. Indeed, retiree centers and associations which should be focused on engaging our community are left to deal with upset callers who have an issue or problem and wonder why we can't solve it. It seems we are constantly in contact with UC leadership on these matters. We acknowledge that plans have been developed and staffing augmentations approved to address the issues. However, the apparent difficulties in hiring and retaining staff leave us with call wait times that are extreme and a very frustrated constituency.

A new unit to focus on survivors has been launched by the RASC and most initial reports seem positive about this initiative. Of course, this addresses perhaps the most egregious shortcoming in recent years—that those who just lost a spouse or partner would have pension payments interrupted for months resulting in an unanticipated interruption of income and many times a loss of medical insurance benefits as well.

A similar initiative is underway for the RASC to hire a core group of retirement counselors. While both CUCRA and CUCEA leadership believe even more counselors are required and that they would be best deployed locally, hopefully this can bring some relief in prolonged processing times.

Another addition to help speed processing times at the RASC is the recent appointment of an outside firm to respond to the most straightforward issues (e.g., resetting passwords, etc.) so these can be handled more quickly and RASC staff can focus on more complex calls. We await data on the results of this approach and are hopeful it results in reduced call wait times.

So where are we? UCOP leadership has acknowledged these problems. A new management team has been assembled. The President has approved the budget for staffing augmentations. Positive measures to be sure. Yet, many RASC vacancies remain as filling positions is challenging. While shortcomings in the Redwood software program are improving there remains limited local campus access. Retiree centers and associations continue to be contacted by retirees when they are unable to contact the RASC in a timely manner.

I would often say that retiree centers and associations help to engage retirees and promote a continued sense of fondness for their campuses. This, of course, causes many to continue to share their time, talents and treasure with their campus. I now fret that this prolonged frustration with retirement processing administration, despite investments and well-intended plans to bring about positive change, is in fact dissolving the fondness retirees may have for their campus. We all have worked for this large organization and know that change is difficult and rarely nimble. I only hope that the planned improvements to the RASC show results to constituents soon as it seems that patience for many has evaporated. I would like *Groundhog's Day* to conclude with the system working and not with people walking out of the movie. Rant over.

## **UPCOMING CONFERENCE**

### **A conversation with UCOP leadership**

As part of our joint meeting with the Council of UC Emeriti Associations on Wednesday, April 26<sup>th</sup>, I will host an interview with Vice President for Human Resources Cheryl Lloyd, newly appointed Associate Vice President for Total Rewards Jay Henderson and Executive Director of the RASC Bernadette Green. This session will start at 9:00 a.m. and address many of the issues discussed above as well as learning about other issues and initiatives. An issue that may be raised during our discussion is UCOP's intent to consolidate all health insurance administration under Jay Henderson's position. Currently, health plan administration is split between systemwide human resources and UC Health. In my view, such consolidation may help avoid some of the issues that arose with the change in pharmacy manager for some health plans to Navitus.

**Retiree Advisory Committee:** It is also anticipated that Cheryl Lloyd will announce the formation of a UC retirees' advisory committee. This new UC sponsored group (name to be determined) would include CUCRA and CUCEA representatives as well as a retiree center director and health care facilitator among others. It may meet 3-4 times a year to have prolonged discussion about benefits and services and to report how programs and initiatives are affecting the retiree community. I am hopeful such institutionally sponsored conversations can be a more efficient and effective way to improve services to our constituents.

**Joint Benefits Committee (JBC) Report:** As most are aware our bylaws provide for a joint committee with CUCEA to address benefits issues and bring matters to UC leadership for action. This year's report is found on our conference website and raises many of the issues found in my rant above although in a much more articulate and studied manner. I would also like to thank CUCRA's new JBC members Eric Vermillion (UCSF) and Jack Powazek (UCLA) for becoming so engaged with the JBC report writing process. They carry the torch and dedication of our prior members Adrian Harris and Joe Lewis.

**New member orientation:** Again, this year prior to the conference, a session will be held (Mon., April 24) for new CUCRA representatives or those who simply need a tune-up. Past Chair Marianne Schnaubelt and Vice Chair Sue Abeles will provide an overview of the roles of CUCRA and opportunities for involvement.

**Revenue allocations:** Last year a CUCRA Reserve Funds Policy Group was established to determine how to best allocate large fund balances that may result from our travel program which is now increasingly active with COVID restrictions and concerns lessened. A revenue distribution formula was recommended, and this formula was utilized to prepare a draft allocation to associations. The Committee met again recently to review the draft allocation plan to ensure it reflected their recommendations. The committee concurred and we now present this allocation report which has been transmitted to representatives separately by email. We will discuss this at our CUCRA meeting on Thursday morning, April 27, so please review this in advance to gain an understanding of the allocation to be made to your association.

**Meeting format:** This committee also made a recommendation regarding future conference formats. Of note, the scale of the revenue allocations above is due largely to CUCRA having minimal expenses in this Zoom-based world. As we consider in-person/hybrid meeting or Zoom options, expenses would likely increase which, in turn, would reduce or eliminate any future allocations. As a reminder, the committee recommended one in-person meeting and one Zoom meeting per year. Associations were asked for feedback on this proposal, but few associations responded. More discussion of this matter is necessary and is an agenda item at our upcoming meeting, with the hope that a decision will be made to allow for conversations with CUCEA to plan our FY24 meetings.

**Internal Audit:** As part of our discussion of financial matters we will hear from our volunteer internal auditor David Olsen who will summarize his findings. The audit report may be found on the conference website. We are grateful for David's effort and those of long-time treasurer John Dahl for the dedicated and open process they demonstrate in managing our funds.

**Conversation with Presidents and Representatives:** In the second portion of our CUCRA meeting on Thursday, I am hoping we can have an open conversation about how CUCRA could better engage with associations. I believe one casualty of being overwhelmed with retirement processing policy issues is that we (and more specifically me) have not been more proactive on outreach to associations and labs. Assuming our movie eventually has a happy ending; how do we best reach out to associations and labs to have thoughtful and productive conversations about achieving our goals?