

Council of University of California Retiree Associations (CUCRA)

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Sue Abeles (UCLA), Vice Chair
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John Dahl (UCLA), Treasurer
Bob Daly (UCR), Information Officer
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October 19, 2023

An Update to Our Membership: October 2023

From John Meyer, Chair, CUCRA

IN THESE CRAZY TIMES, GET ORIENTED

There have been several important developments since our spring conference. Before discussing those issues let me first encourage individuals new to CUCRA (or those requiring a tune-up) to participate in Monday's (10/23; 10-11:30 a.m.) orientation session hosted on Zoom by Past CUCRA Chair Marianne Schnaubelt (UCI) and Vice Chair Sue Abeles (UCLA). In addition to discussing the history, purpose and priorities of CUCRA, they will provide a coveted decoder ring for the many acronyms encountered as we interact with the UC Office of the President. That is, when we speak with UCOP and UCRS through the JBC about PPOs and RASC in coordination with CUCEA. To participate in the orientation session, send an email to skabeles@yahoo.com and a Zoom link will be sent.

UC RETIREE & EMERITI ADVISORY COMMITTEE

After much discussion UC Vice President for Human Resources Cheryl Lloyd has appointed a UC Retiree/Emeriti Advisory Committee. We hope this will provide a routine and supported group that can address the most pressing issues affecting retirees. Eric Vermillion (UCSF) and I serve as CUCRA representatives. Other members include representatives from CUCEA, the Academic Senate Health Care Task Force, a campus Administrative Vice Chancellor, Vice President Cheryl Lloyd and Associate Vice President Jay Henderson.

The first meeting of the committee was held on August 31. The committee discussed overall objectives and also received a report developed by Deloitte on issues concerning out-of-state retirees and the VIA Benefits program. We have long had two concerns related to the program: 1) it has not received a COLA to its \$3,000 annual allowance since its inception ten years ago; and 2) we have asked whether the United Healthcare (UHC) program could be added as a choice for retirees.

Conditions requested from UHC were considered too disruptive to add the program at this time, although they can be raised again when the UHC contract is up for renewal. Rationale given for the lack of a COLA was less compelling and further analysis was requested.

Another issue raised at our initial meeting was the need to be involved at the beginning of a Request for Proposal (RFP) process for health insurance or other benefits. While we have previously been involved

in ranking RFPs, it is critical that we provide some counsel in the actual development of RFPs and review ranking criteria—which is the true establishment of priorities in selecting new vendors.

The second meeting of the advisory committee will be held the morning of October 25 before the start of our conference which begins at 12:30.

CUCRA SUMMER SESSIONS

Emerging from the fog of the pandemic, we reinitiated our practice to have outreach meetings in southern and northern California to join with local association representatives between our spring and fall conferences. The practice was begun by then Chair Marianne Schnaubelt and Vice Chair Joe Lewis. Such in-person sessions were paused during the pandemic.

At our spring CUCRA conference there was discussion and support for reinstating this practice. On July 10 a meeting was conducted at UC Irvine with another on August 11 at UC Berkeley. I approached these sessions with minimal expectations but was pleased (and pleasantly surprised) by both the broad representation at the meetings and the animated conversation. While campus and lab associations may have begun in-person meetings, these were the first in-person CUCRA sessions in quite a while. For me, in-person meetings offer a much-improved ability to have meaningful discussions. I appreciate all who were able to attend.

RETIREMENT ADMINISTRATION SERVICE CENTER (RASC)

Progress has been made with the processing of survivors' benefits. A new team is in place and processing times have greatly improved. There is still effort necessary to ensure processing delays do not result in a lapse in health insurance coverage for survivors. UCOP administration is well aware of this issue and Joint Benefits Committee members have been tracking this matter closely.

Processing of new retirements has also improved especially due to the "no lapse in pay" program where initial payments can be made based on estimates and adjusted after final pension calculations are completed. Generally, such estimates are very close to the final payment determinations and any adjustments have been minor. Challenges certainly remain and hiring approved positions is a major constraint to RASC's ability to meet service level standards.

It is my understanding that a new team of retirement counselors has been hired by the RASC. It has long been the position of CUCRA and CUCEA that such positions should be deployed locally. RASC Executive Director Bernadette Green will be attending our conference, and we look forward to hearing from her on how the counselors' assignments will be managed.

UPCOMING CONFERENCE

- A Hybrid Experiment

Our upcoming conference will be a test of a hybrid format with participants both attending the meeting site at UC Davis in-person and a near equal number of participants online using Zoom. While we look

forward to being together with many of you again, the format may have its challenges so we ask for your patience in advance. We'll do our best to juggle participation with those on Zoom and in the meeting room. Near the close of our CUCRA session on Thursday morning we'll ask for feedback on how this format has worked for you—so be on the lookout for suggestions throughout the conference whether you are here in Davis or at home joining online.

- Joint Benefits Committee (JBC) Report

As is typical, a large portion of our Joint meeting session on Wednesday afternoon will be a discussion of issues raised in the Joint Benefits Committee (JBC) report. You'll note this year's report (available from a link on a recent CUCRA Retirees Report email and on our webpage with other meeting materials) is quite extensive and covers a range of issues including the UCRS contribution holiday which has been raised by some UC Regents, more details about RASC processing, our new retiree/emeriti advisory committee, VIA benefits and investment returns.

JBC Chair Roger Anderson (UCSC) will provide an overview of the report. UC Vice President Cheryl Lloyd, Associate Vice President Jay Henderson, and RASC Executive Director Bernadette Green will be at the meeting to discuss these issues and others during the joint session Wednesday morning.

- CUCRA Session on Fixed Income Options

Eric Vermillion (UCSF) has raised the issue that the UC Retirement System investment funds no longer offer a meaningful guaranteed income option as it had previously. While Fidelity may have such an option, we have been curious why UCRS which offers other innovation investment programs does not have a guaranteed income alternative. Eric will facilitate a discussion on this matter with UCRS investment managers during our CUCRA only session Thursday morning (this item is scheduled for 10:00 a.m.).

- CUCRA FINANCES

Please review the CUCRA financial reports before our session on Thursday morning. Treasurer John Dahl will provide an overview of the reports. An issue that will influence our projections is what our future meeting formats will be. Currently our working assumption is one hybrid and one Zoom conference each year.

- APPRECIATION TO UC DAVIS RETIREES ASSOCIATION

Thank you in advance to the UC Davis Retirees Association for sponsoring our conference dinner on Wednesday night—we look forward to toasting your generosity!

A NOTE ON OUR PARTNERSHIP WITH CUCEA

As you know there are two groups charged with engaging with the Office of the President on retiree issues: the Council of UC Retiree Associations (us...) and the Council of UC Emeriti Associations. As far as most benefit programs are concerned, our interests are the same. I close this update with a comment on how closely our two groups work to ensure we are approaching issues with a unified approach. I have found the leadership of our emeriti colleagues supportive and always helpful as we address a variety of issues together.