

Council of University of California Retiree Associations (CUCRA)

Survey of Member Associations

At the request of CUCRA's executive committee, the presidents (or their authorized representatives) of the 13 member associations were invited to respond to a brief survey of their organizational structures, relationships with UC, and operational and programmatic information. The results are presented in this report.

November 1, 2013

Name: University of California Retirees' Association at Berkeley (UCRAB)

Location: Berkeley Campus

Founded: 1987

Web Site: <http://thecenter.berkeley.edu/ucrab.shtml>

Legal Status: UC Berkeley Affiliated Organization

Institutional Relationship: Association is affiliated with the Berkeley Retirement Center, which reports to the Office of the Vice Provost for the Faculty. Two UCRAB representatives serve on the Center's Policy Board.

Institutional Support: Association membership and program activity is supported by the Berkeley Retirement Center. The Center receives major financial support from the Vice Provost's Office; the Association funds a work-study student to assist with UCRAB business; meeting space for the UCRAB board is provided at the Center.

Number of Board Members: 10

Frequency of Board Meetings: Monthly, except August and December

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | |
|-------------------|-------|
| Annual single | \$ 20 |
| Two-year single | \$ 35 |
| Three-year single | \$ 50 |

Number of Members:

| | |
|----------------------|-----|
| California residents | 650 |
| Non-CA residents | |

Membership open to: Retired staff, Retired faculty; Spouses/partners.

Newsletter Frequency: Quarterly

Newsletter Distribution: Mailed hard copies 25%; Electronic 75%

Most Successful Programs/Activities:

- Trips, both day and overnight
- Quarterly luncheons with speakers

New Programs Established in the Past Three Years:

- On-line distribution of newsletter.

Name: UC Davis Retirees' Association

Location: Davis Campus

Founded: 1989

Web Site: <http://ucdra.ucdavis.edu/>

Legal Status: UC Davis Affiliated Organization

Institutional Relationship: Retiree Center

Institutional Support: Associated with and supported by Retiree Center, which is associated with Development and Alumni Relations; 1100 sq. ft.; 2 FTE; Center is funded by Academic Affairs/Provost, Development/Advancement, Retiree and Emeriti Associations, and funds generated by events and trips.

Number of Board Members: 21

Frequency of Board Meetings: Monthly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | |
|----------------------------|-------|
| Annual single/couple | \$ 10 |
| Life single/couple | \$100 |
| Surviving spouses/partners | Free |

Number of Members:

| | |
|----------------------|-----|
| California residents | 437 |
| Non-CA residents | 10 |

Membership open to: Retired staff, Retired faculty; Spouses/partners

Newsletter Frequency: Three issues/year

Newsletter Distribution: Mailed hard copies 55%; Electronic 45%

Most Successful Programs/Activities:

- Scholarship program
- Establishment of the Retiree Center
- Participation in annual Picnic Day parade
- New retiree reception
- Retiree Resource Day

New Programs Established in the Past Three Years:

- Retiree Resource Day
- "Transitioning to Retirement" panel session
- Retiree Fall Fest
- Picnic Day parade participation

Name: UC Irvine Retirees Association (UCIRA)

Location: Irvine Campus

Founded: 1983

Web Site: <http://www.hr.uci.edu/retirees>

Legal Status: 501 (c)(3) organization

Institutional Relationship: UCI support group (through UCI Foundation)

Institutional Support: Associated with and supported by UCI Center for Emeriti and Retirees. Center is associated with Human Resources, which is funded by Executive Vice Chancellor and Administrative and Business Services; 400 sq. ft. space; 1 FTE.

Number of Board Members: 6

Frequency of Board Meetings: Annual

Association Funds Deposited and Managed via: UCI Foundation

Membership Dues:

Annual single \$ 20

5-Year single \$ 50

Life single \$150

Number of Members:

California residents 672

Non-CA residents 29

Membership Open to: Retired staff; retired faculty; Spouses/Partners; Retirees from other UC locations residing in Orange County

Newsletter Frequency: Annual (with membership renewal letter)

Newsletter Distribution: Mailed hard copy 100%

Most Successful Programs/Activities:

Chancellor's Reception and Art Show

Golf Tournament

New Programs Established Within the Last Three Years:

Name: EX-Ls

Location: Lawrence Berkeley National Laboratory

Founded: 1982

Web Site: <http://www.lbl.gov/EX-Ls>

Legal Status: LBNL Affiliated Organization

Institutional Relationship: Association is affiliated and supported by the Berkeley Retirement Center. Two representatives from the EX-Ls serve on the Center's Policy Board.

Institutional Support: LBNL contracts with the Center to assure the same level of service for Lab retirees as for UC Berkeley retired faculty and staff.

Number of Board Members: 17, including 9 officers and 2 from other groups.

Frequency of Board Meetings: Quarterly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | |
|------------------|-------|
| Annual single | \$ 15 |
| Annual couple | \$ 15 |
| Life single | \$150 |
| Spouses/partners | Free |

Number of Members:

| | |
|----------------------|-----|
| California residents | 195 |
| Non-CA residents | 12 |

Membership open to: Retired staff, Retired faculty; Spouses/partners

Newsletter Frequency: Quarterly

Newsletter Distribution: Mailed hard copies 15%; Electronic 85%

Most Successful Programs/Activities:

- Quarterly luncheons
- Quarterly newsletter; communication is a major goal of the Association.
- Volunteer assistance to the Lab for various Lab programs.
- Affiliation with the Berkeley Retirement Center

New Programs Established in the Past Three Years:

Retiree survey in 2011 to assess retirees and their interests and levels of satisfaction; results shared with Lab management for a greater understanding and appreciation of retirees.

Currently exploring the possibility of an oral history project with Lab Management.

Name: Livermore Laboratory Retirees Association

Location: Lawrence Livermore National Laboratory

Founded: 1985

Web Site: <http://llnlretirees.org>

Legal Status: LLNL Affiliated Organization

Institutional Relationship: Affiliated with LLNL.

Institutional Support: None

Number of Board Members: 4

Frequency of Board Meetings: As needed.

Association Funds Deposited and Managed via: Private credit union account.

Membership Dues:

Annual single \$ 10

Annual couple \$ 10

Number of Members:

California residents 550

Non-CA residents 50

Membership open to: Retired staff; Spouses/partners.

Newsletter Frequency: Monthly

Newsletter Distribution: Mailed hard copies 5%; Electronic 95%

Most Successful Programs/Activities:

Monthly luncheons

Annual picnic

New Programs Established in the Past Three Years:

Membership survey.

Name: Laboratory Retiree Group

Location: Los Alamos National Laboratory

Founded:

Web Site: <http://www.losalamoslrg.org>

Legal Status: LANL Affiliated Organization

Institutional Relationship:

Institutional Support:

Number of Board Members: 10

Frequency of Board Meetings: Monthly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

Annual single \$ 12

Spouses Free

Annual Friends of LRG \$ 15

Number of Members:

California residents

Non-CA residents

Membership open to: Retired staff, Spouses/partners; Friends of LRG

Newsletter Frequency:

Newsletter Distribution: Mailed hard copies %; Electronic %

Most Successful Programs/Activities:

New Programs Established in the Past Three Years:

Name: UCLA Retirees' Association

Location: Los Angeles Campus

Founded: 1982

Web Site: www.errc.ucla.edu

Legal Status: 501(c)(7) organization

Institutional Relationship: Emeriti/Retirees Relations Center (ERRC)

Institutional Support: ERRC is associated with the Chancellor's Office, and provides administrative support, including membership database management and space for meetings and records; 1000 sq. ft; 2.5 FTE.

Number of Board Members: 17

Frequency of Board Meetings: Monthly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | |
|---------------|-------|
| Annual single | \$ 20 |
| Annual couple | \$ 25 |

Number of Members:

| | |
|----------------------|-----|
| California residents | 865 |
| Non-CA residents | 35 |

Membership open to: Retired staff, Retired faculty; Spouses/partners; Current staff; Individuals who do not qualify and are approved by the board.

Newsletter Frequency: Quarterly

Newsletter Distribution: Mailed hard copies 100%; Electronic 0%

Most Successful Programs/Activities:

- Annual arts and crafts show
- Holiday party
- 30th anniversary celebration
- Overnight excursions
- Interest groups such as book clubs, hiking, Scrabble

New Programs Established in the Past Three Years:

- Overnight excursions to Grand Canyon and Yosemite
- Hollywood Bowl concert

Name: PARRA (President's and Regents' Retirees Association)

Location: Office of the President (UCOP)

Founded: 1980

Web Site: <http://thecenter.berkeley.edu/parra.shtml>

Legal Status: UCOP Affiliated Organization

Institutional Relationship: Association is affiliated with and supported by the Berkeley Retirement Center. Two representatives from PARRA serve on the Center's Policy Board

Institutional Support: The Office of the President provides a small contribution on an annual basis to support the Association's affiliation with the Berkeley Retirement Center.

Number of Board Members: 15

Frequency of Board Meetings: Quarterly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | |
|---------------|-------------------|
| Annual single | \$ 15 (voluntary) |
|---------------|-------------------|

Number of Members:

| | |
|----------------------|-----|
| California residents | 700 |
|----------------------|-----|

| | |
|------------------|--|
| Non-CA residents | |
|------------------|--|

Membership open to: Retired staff, Retired faculty.

Newsletter Frequency: 2 issues per year

Newsletter Distribution: Mailed hard copies 0%; Electronic 100%

Most Successful Programs/Activities:

Excellent speaker series in conjunction with fall and spring luncheons

New Programs Established in the Past Three Years:

On-line distribution of newsletter.

Name: UC Riverside Retirees' Association

Location: Riverside Campus

Founded: 1990

Web Site: <http://emeriti-retirees.ucr.edu/>

Legal Status: 501(c)(3) organization

Institutional Relationship: Vice Chancellor for University Advancement, Office of Alumni and Constituent Relations

Institutional Support: Annual allocation of \$1,500 from Chancellor's discretionary funds; use of Alumni Association's board room for board meetings, and dining/meeting rooms in the Alumni Center for luncheons and programs; small meeting space in Orbach Science Library.

Number of Board Members: 5

Frequency of Board Meetings: Quarterly

Association Funds Deposited and Managed via: UCR Foundation, UC Regents, and private bank account.

Membership Dues:

| | |
|---------------|-------|
| Annual single | \$15 |
| Life single | \$150 |

Number of Members:

| | |
|----------------------|-----|
| California residents | 154 |
| Non-CA residents | 1 |

Membership open to: Retired staff, Retired faculty; Spouses/partners.

Newsletter Frequency: Quarterly

Newsletter Distribution: Mailed hard copies 20%; Electronic 80%

Most Successful Programs/Activities:

Reestablishing a functioning board. Now in place: president, 1st and 2nd vice presidents, and treasurer; recruiting for a secretary, membership chair, and 2 members-at-large.

Assigned a shared Emeriti-Retiree space in the Orbach Science Library.

New Programs Established in the Past Three Years:

Upgrade of association website -- in process.

On-line capability for membership application, payments of dues, luncheon registrations, and scholarship fund -- in process

Use of campus email system -- pending

Campus and community discounts -- pending

Name: UCSD Retirement Association

Location: San Diego Campus

Founded: 1984

Web Site: <http://retirement.ucsd.edu>

Legal Status: UCSD Affiliated Organization

Institutional Relationship: Association is affiliated with and supported administratively by the UCSD Retirement Resource Center (RRC), which is part of the Human Resources Department.

Institutional Support: Retirement Resource Center is funded by the HR Department (\$10K), Retirement and Emeriti Association dues (\$20K), and revenue generated by events and trips (\$5K); 740 sq. ft.; 2 FTE.

Number of Board Members: 16

Frequency of Board Meetings: Monthly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | |
|---------------|-------|
| Annual single | \$ 30 |
| Annual couple | \$ 40 |
| Life single | \$300 |
| Life couple | \$400 |

Number of Members:

| | |
|----------------------|------|
| California residents | 1550 |
| Non-CA residents | 53 |

Membership open to: Retired staff; Retired faculty; Spouses/partners.

Newsletter Frequency: Monthly

Newsletter Distribution: Mailed hard copies 75%; Electronic 25%

Most Successful Programs/Activities:

- Annual holiday party and spring luncheon
- Quarterly art and music soirees
- Wide variety of practical seminars and interest groups
- Active volunteer program

New Programs Established in the Past Three Years:

- Healthy Eating/Healthy Living monthly seminars
- Triton Investments Group and Fiction Book Club
- Medicare seminar
- Presentations by local senior residential housing communities.

Name: UCSF Retirees Association

Location: San Francisco Campus

Founded: 1986

Web Site: <http://retirees.ucsf.edu/retirees>

Legal Status: UCSF Affiliated Organization

Institutional Relationship: UCSF Affiliated Organization

Institutional Support: Provided with office space, and \$10,000 annual support. Working with Alumni Association for assistance with communications and event planning.

Number of Board Members: 15 **Frequency of Board Meetings:** every 6 weeks

Association Funds Deposited and Managed via: Private Bank Account

Membership Dues:

| | |
|---------------|---------|
| Annual single | \$12.50 |
|---------------|---------|

Number of Members:

| | |
|----------------------|-----|
| California residents | 500 |
| Non-CA residents | 30 |

Membership open to: Retired staff; Retired faculty; Spouses and partners

Newsletter Frequency: 3 issues/year; sporadic

Newsletter Distribution: Mailed hard copies: 33%; Electronic: 66%

Most Successful Programs/Activities:

Monthly activity planned by Program Committee; very popular with membership.
Biannual hosted luncheon; well attended.

New Programs Initiated Within Past Three Years:

Extended monthly programs to include sites in the north bay (Marin Co.) and east bay (Alameda and Contra Costa Cos.) Expanded geographic areas have opened up many more opportunities.

Name: UCSB Retiree Association

Location: Santa Barbara Campus

Founded: 1990

Web Site: <http://hr.ucsb.edu/retirees/welcome>

Legal Status: UCSB Affiliated Organization

Institutional Relationship: Human Resources

Institutional Support: Associated with and supported by staff member in Human Resources.

Number of Board Members: 10

Frequency of Board Meetings: Monthly

Association Funds Deposited and Managed via: Private bank account.

Membership Dues:

| | | |
|----------------------|------|-------------------------------|
| Annual single/couple | \$10 | (\$15 effective July 1, 2014) |
|----------------------|------|-------------------------------|

Number of Members:

| | |
|----------------------|-----|
| California residents | 196 |
|----------------------|-----|

| | |
|------------------|---|
| Non-CA residents | 4 |
|------------------|---|

Membership open to: Retired staff, Spouses/partners; Retirees from other UC locations.

Newsletter Frequency: Quarterly

Newsletter Distribution: Mailed hard copies 64%; Electronic 36%

Most Successful Programs/Activities:

Monthly breakfast meetings

Biannual emeriti/retiree events

Annual BBQ and annual holiday luncheon

New Programs Established in the Past Three Years: None

Name: UCSC Retirees Association

Location: Santa Cruz Campus

Founded: 1988

Web Site: <http://retirees.ucsc.edu>

Legal Status: UC Santa Cruz Affiliated Organization

Institutional Relationship: Chancellor's Office and University Relations

Institutional Support: Chancellor's Office funds postage for newsletter; Joint request with with the Emeriti Association to the Chancellor and Executive Vice Chancellor/Provost is pending for additional support to staff an on-office office.

Number of Board Members: 15

Frequency of Board Meetings: 6 per year

Association Funds Deposited and Managed via: UC Santa Cruz Foundation and UC Regents accounts.

Membership Dues:

| | |
|---------------|-------|
| Annual single | \$ 15 |
| Annual couple | \$ 20 |
| Life single | \$150 |
| Life couple | \$200 |

Number of Members:

| | |
|----------------------|-----|
| California residents | 194 |
| Non-CA residents | 11 |

Membership open to: Retired staff, Retired faculty; Spouses/partners

Newsletter Frequency: Quarterly

Newsletter Distribution: Mailed hard copies 40%; Electronic 60%

Most Successful Programs/Activities:

Bruce Lane/Retiree Association Memorial Scholarship program which supports military veteran students.

Quarterly potluck luncheon programs

Health care and pre-retirement information sessions.

New Programs Established in the Past Three Years:

Collaboration with Emeriti Association to establish an on-campus office.

Establishment of an endowed fund to support the annual scholarship program.

Following is a compilation of responses to the question, "With which issues or challenges can CUCRA potentially better serve your association?"

Forum to present ideas and share concerns (4)
Sharing initiatives for association activities (3)
Networking opportunities among the associations (3)
Opportunities to learn best practices from other associations (2)
Developing and using effective association websites

Encourage participation by all associations on CUCRA committees and leadership roles

Advocacy for retirees, especially health care insurance (5)
Reports and updates from UCOP regarding retirement benefits (2)
Coordination of benefit issues that impact all UC retirees (2)
Advocacy for more equitable system of calculating insurance premiums for retirees in all employment tiers

Recruitment and retention of members (3)
Recruitment of volunteer leadership from among association membership (2)
Advocacy for access to contact information for new retirees (for associations without a professionally staffed center)

Change CUCRA's dues structure from the flat tax per member to a tiered system based on the size of the member associations (e.g., 200-400 members = \$200; 400-600 members = \$300; 600 and above members = \$500)