

Origins and Brief History of the Joint Benefits Committee

The JBC was not included in the CUCRA Bylaws and Standing Rules. It was proposed originally as part of a report entitled: "*Retirement Benefit Proposal*," and was to be formed by the chairs of CUCRA and CUCEA. The JBC was appointed in late 1994 by Bob Wild, Chair of CUCEA, and Adrian Harris, as Chair of CUCRA. Each chair named two representatives, and those four named three other members, possessing a variety of knowledge and interests. There have been a number of changes in membership through the years, but Harris has chaired the Committee since its inception, and William Klein has continued to serve as a member since the beginning.

The following statement was included in the Minutes of the September 26, 1994, CUCRA meeting:

"Adrian reminded the group that at the last meeting Phil had appointed himself and Adrian as delegates to the Joint Benefits Committee, referred to in ACTION 1. of the RETIREMENT BENEFIT PROPOSAL. However, such a committee was never formed. Adrian suggested that the Chair and Chair-elect serve as our representatives and asked Bob Wild to raise this matter with CUCEA, and if agreed, perhaps we can arrange a joint meeting soon."

In a January 1995 report to delegates and alternates in preparation for the next meeting of CUCRA, Harris stated the following:

"A Joint Benefits Committee has been appointed including Ad Brugger, Ralph Nair (CUCEA Representative from UCSB), Moses Greenfield (CUCEA Representative from UCLA), and me. The four of us have added the following three representatives, who bring expertise in several areas to the Committee: William Klein (Professor of Law, Emeritus from UCLA), Adrian Kragen (Professor of Law, Emeritus from Boalt), and Eugene Lee (Professor of Political Science, Emeritus and former Director, Institute of Governmental Studies at UCB). We also expect to interact with Professor Daniel Mitchell, the current Chair of the Systemwide Faculty Welfare Committee. Several items have already been identified for future action: change the policy which requires spouses of deceased annuitants to remove from Regents investment funds all accrued 403(b) funds within nine months; urge

the provision of a long-term care insurance plan for all annuitants (and active employees); discussion of future health benefit changes, before they are made; and the retroactive provision of more than 80% retirement benefits to those who retired prior to the change which allowed up to a maximum of 100% benefit.

"We hopefully will have a full report from this Committee for discussion and action at our forthcoming meeting. Your additional ideas will also be greatly appreciated. Please try to seek out ideas from the larger group of University people with whom you interact, prior to our meeting.

"I am pleased to report that Vice President Wayne Kennedy has agreed to join us for lunch, and a discussion of issues which we have in mind, and, of course, items he would like to raise with us as well."

Adrian Harris
Founding Chair