

Orientation Materials for CUCRA Fall, 2024

What is CUCRA?

In 1993, representatives of the retiree associations from the nine University of California campuses and three University-managed Department of Energy (DOE) laboratories organized the Council of University of California Retiree Associations (CUCRA).

Their goal was to provide a single organization that could speak for the many University and laboratory retirees on issues that could affect pensions, retiree benefits and privileges.

CUCRA's purposes are:

- to obtain, enhance, and disseminate appropriate and meaningful information among its constituents;
- to encourage each campus and national laboratory to organize and maintain an active retirees organization;
- to be an advocate for all retirees of the University;
- to foster further study of benefits and privileges of staff retirement;
- and to maintain mutually supportive relations between the University and retirees.

Who is a member?

Each campus, Laboratory and Office of the President/Regents retiree association as well as the CUCRA officers.

CUCRA also has two honorary members who were granted lifetime membership.

How is CUCRA funded?

Member associations pay dues to CUCRA; the amount is based on the number of retirees from each location. Dues are used to cover CUCRA operating expenses, such as meeting costs, officer travel, and other operational needs. The Treasurer provides an update on CUCRA finances at each meeting and prepares the budget for the upcoming year for presentation at the fall meeting.

CUCRA also receives income from its Travel Group (see discussion below about the Travel Group), which is used to cover CUCRA discretionary expenses (such as, expenses of the Travel Group, special projects like the CUCRA survey of retirees, etc.). Surplus funds generated by CUCRA in any given fiscal year after required reserve balances are met are utilized for the benefit of the CUCRA membership, in the following priority, as outlined in the Standing Rules:

- a.) to mitigate an increase in dues should one be projected for the coming year;
- b.) to cover the costs of the semiannual meetings (exclusive of elective costs such as networking dinner/reception);
- c.) to distribute any remainder after a.) and b.) have been covered to the member associations using the following formula: 50% distributed on an equal share to all member associations and the remaining 50% distributed on a pro rata share basis to member associations based on their participation in the travel program.

When are the meetings and who comes?

CUCRA meets twice a year, in April and in October. Meetings may be conducted via zoom, in person, or in a hybrid format (both zoom and in person). Hosting duties rotate among the campuses. There is a list of upcoming hosting locations on the CUCRA website. The meetings are generally held in a two-day format. There is a joint meeting with the Council of University of California Emeriti Associations (CUCEA) and the Office of the President and a separate meeting of just CUCRA. The agenda for the CUCRA meeting is developed by the CUCRA officers and the agenda for the joint meeting is developed in conjunction with CUCEA leadership.

Each retiree association has one representative and one alternate who attend the twice-yearly meetings. For some locations the president of the local retirees' association serves as the CUCRA representative.

What is the leadership of CUCRA?

CUCRA is led by five officers elected by the Council: Chair, Vice Chair/Chair Elect, Secretary, Treasurer, and Information Officer. They form the CUCRA Executive Committee along with the immediate past chair. Elections are held at the fall meeting; the Chair, Vice Chair and Secretary are elected in even-numbered years and the Treasurer and Information Officer are elected in odd-numbered years. Officers serve for two years and may be elected to a second term. The Treasurer, however, may serve for more than two terms.

Where can I find more information?

The Bylaws and the Standing Rules can be found on the CUCRA website <<http://cucra.ucsd.edu/>> under the “About Us” menu item. Both give more information on the duties of the officers, the meetings, and so forth. We also recommend that new members read the minutes of previous meetings <<http://cucra.ucsd.edu/records/>>, both the joint meetings and the CUCRA meetings, to get a sense of what is discussed and what some of the issues are.

What is my role as a representative?

One of the reasons that CUCRA works so well is the different perspectives we bring to any issue, not only because locations can be so different but also because of the range of positions and experiences the members had while working. Thus your primary role is to come prepared to discuss the items on the agenda. The more opinions and ideas we hear, the stronger and more comprehensive a decision or response will be, whether it is a topic in the Joint Benefits Committee (JBC) report, a decision on bylaws, a conversation on the travel program, or consideration of the CUCRA budget. It is the expectation that representatives will consult with their retiree association boards before the meeting to get their thoughts on important topics and will share information received at CUCRA meetings with their members.

Representatives can also suggest topics for discussion at the meeting by getting in contact with the Chair.

Prior to each meeting, the Information Officer will request that location representatives file a brief written report from their association to share information about their activities. These reports are posted on the website for the benefit of all CUCRA members.

Other documents, such as the Joint Benefits Committee report, are also posted on the website before the meeting. It helps to review these ahead of time as well as the minutes from the previous meeting.

When we meet in person, the meetings are also a chance to network with other members and ask questions about programs and activities at their locations.

Representatives are also asked to be volunteers for the Nominations Committee, ad hoc committees, and UCOP committees. Volunteering for one of these committees is a great way to get involved with CUCRA.

We also suggest that outgoing CUCRA representatives take the time to brief the incoming representative

What are all these acronyms?

- **CUCEA:** The Council of University of California Emeriti Associations
- **UCOP:** University of California Office of the President
- **RASC:** University of California Retirement Administration Service Center
- **JBC:** The Joint Benefits Committee, which is a collaborative committee staffed by CUCRA and CUCEA representatives
- **AROHE:** CUCRA and most of its member associations are members of the Association of Retirement Organizations in Higher Education (AROHE).
- **CUCSA:** The Council of University of California Staff Assemblies
- **ERAC:** The Emeriti-Retirees Advisory Committee is a newly formed committee appointed by the UC Vice President of Human Resources.

What is our relationship with CUCEA and UCOP?

CUCEA is the sister organization to CUCRA. Together, the organizations form a strong voice when speaking with Office of the President as the combined strength of the two organizations represent the spectrum of UC retirees. CUCRA works closely with CUCEA on issues of concern to both councils, particularly health benefits.

CUCRA and CUCEA have worked hard to form an effective relationship with the Office of the President, working to establish trust and respect. Recently, the Emeriti-Retiree Advisory Committee (ERAC), which includes representation from the Office of the President, a campus Vice Chancellor, the Academic Senate, CUCRA, and CUCEA has been formed at the request of CUCRA and CUCEA leadership to promote better, ongoing communication with UCOP. We want UCOP to consult with us in advance if changes in health benefits, for example, are being considered. We want to be able to bring issues to them such as the long delays in processing applications for survivor benefits. We've been successful, though it is an on-going process. CUCRA and CUCEA are consulted on many issues; members of our Councils have been asked to serve on important committees; and we have been invited to work on projects such as revising the Open Enrollment Booklet. The ERAC Committee has had four meetings to date and is on a schedule to meet every other month.

What is CUCRA's relationship with retiree centers and center directors?

Because of the Retiree Center Directors close working relationships with the local associations, Center Directors are invited to attend the joint CUCRA/CUCEA meeting as well as the individual meetings of CUCRA and CUCEA. They are not voting members of CUCRA but participate in meeting discussions.

Does CUCRA have committees?

CUCRA has two standing committees – the JBC and the Nominations and Elections Committee.

The JBC is comprised of members from both CUCRA and CUCEA. Its purpose is to monitor and make recommendations regarding the University's pension and benefit programs, health insurance, retirement delivery systems, and other benefit programs.

The Committee on Nominations and Elections finds and nominates candidates for the open positions that year and manages the election process.

Ad hoc committees may be formed as necessary, such as those formed to review the Bylaws or to organize and carry out CUCRA's survey of UC retirees.

CUCRA also has a Travel Group, run by volunteers, which offers domestic and international trips to UC retirees <<http://cucra.ucsd.edu/travel/>>. The commission income comes to CUCRA.

What are the current topics of interest to CUCRA?

- Reorganization and service improvement of the RASC
- Budget and finances, particularly income from the Travel Group
- Health benefits and the impact of changes on retirees
- The impact of inflation on retirement benefits