

Executive Committee

John Meyer (UCD), Chair

Sue Abeles (UCLA), Vice Chair

Patti Owen, (UCB) Secretary

John Dahl (UCLA), Treasurer

Pat Price (UCI), Information Officer

Marianne Schnaubelt (UCI), Past Chair

October 23, 2024

An Update to Our Membership: October 2024

From John Meyer, Chair, CUCRA

ENGAGEMENT, ADVOCACY AND PARTNERSHIPS

Some reflections

As I begin this update, I realize that this will be my last conference serving as Chair of CUCRA. It is a privilege to serve in this position and I believe we have built upon the progress of prior leaders to advocate on behalf of UC retirees. One of CUCRA's primary responsibilities is to engage with executives at the UC Office of the President (UCOP). It would be hard to imagine a period with more wholesale change of leadership at UCOP than we have experienced over the last several years. This has included a new Vice President for Human Resources, several new executives overseeing insurance benefits, and a new

Director of the Retirement Administration Service Center (RASC). And the RASC, as we well know, has been undergoing a rebuilding process with new technology and an unprecedented number of new staff positions to meet its obligations and improve service delivery.

With these new leaders at UCOP we have had the opportunity to reestablish relationships. As the new leaders often inherited problems we had identified, they seemed more open to identifying challenges and trying new approaches to service delivery. One such change has been to consolidate all health insurance administration under UC Human Relations—it was previously split between HR and UC Health—a model that at times resulted in conflicting objectives and poor communication.

We also now have over one year's experience with a new UC sponsored committee: the Emeriti and Retiree Advisory Committee (ERAC) established by Vice President for Human Resources Cheryl Lloyd. This UC committee supplements the efforts of our CUCRA-CUCEA Joint Benefits Committee (JBC) by having bimonthly meetings with UC leadership to discuss issues of interest in a timely manner. There are several instances in past years where we have heard of

emerging problems from retirees where it seemed UC management had not yet been advised on the magnitude of an issue: three prime examples being the processing (or lack thereof) of survivor's benefits, transition to Navitus (a new pharmacy benefit manager), and the most recent "Experian Experience" where an identity check service was to be extended yet no longer allowed family members to participate. We are hopeful that by more routine interactions with UC leadership we can provide timely feedback on current programs and comment and advise on any contemplated changes.

During this same period, we also were challenged with how to engage our members during a global pandemic (oh, that...). A silver lining, of course, is that through technology we were able to readily communicate through Zoom or similar means. With our demographic this is especially helpful for those who cannot or choose not to travel for meetings. This seems as if it will be a permanent part of our conferences allowing those who cannot travel to stay engaged.

Our colleagues at the Council of UC Emeriti Associations (CUCEA) are one of our primary partners. To state the obvious, retiree health insurance benefits are the same whether you be a staff retiree or a faculty

member. It is important that we work together as we advocate for our members. We routinely coordinate with our emeriti colleagues and have a positive relationship.

CUCRA Executive Committee Elections

While election results have not yet been announced, given that each office had but one candidate I have much more certainty of our election results than I do about the outcome of our national election on November 5th. UCLA's Sue Abeles will move to the Chair position. Sue has been an extraordinary Vice Chair. She is responsive, knowledgeable and willing to put in the time to engage on issues with our UCOP colleagues. Projected to be Vice Chair is Emily Galindo from UC Davis. I have had the pleasure to work with Emily professionally at Davis and as a volunteer on our campus retiree board. Bright, positive and a very hard worker, Emily will be a wonderful addition to the Executive Committee. Voting exit polls are showing that Elise Woods will serve as Secretary. She has touched many UC campuses during her undergraduate and professional career, and she is a positive force involved with Berkeley's retiree association. We are grateful to outgoing Secretary Patti Owen who made a heroic effort to show our meetings to be interesting and comprehensive (no matter what really happened).

Bob Daly returns as a member of the Joint Benefits Committee—he has been long involved with UC Riverside, Irvine and CUCRA activities. Appreciation to Jack Powazek who has served in this JBC position and will now lead UCLA's Retirees Association. These four soon-to-be elected individuals alone have nearly 150 years of UC service. Whoa.

Continuing their service will be CUCRA Treasurer-for-Life UCLA's John Dahl and new (and outstanding) Information Officer Pat Price from Irvine. UCSF's Eric Vermillion will remain on the JBC. And much gratitude to Marianne Schnaubelt who has served as Past Chair. She will depart the Executive Committee but will occupy the coveted Past-Past Chair. She will continue to participate in the new member orientation program as she is the holder of the acronym decoder ring (i.e., she can define CUCRA, CUCEA, JBC, ERAC, UCOP, UCRS, UCRAB, PARRA, etc.). When I first participated in CUCRA sessions, Marianne demonstrated positive leadership in partnership with CUCEA and advocated well on behalf of retirees. She was a wonderful Chair to follow. The new Executive Committee is in place beginning January 1, 2025.

CONFERENCE TOPICS

Joint meeting with CUCEA—Tuesday afternoon

The other part of the retirement system

During most of my time involved with CUCRA a primary topic of interest has been the Retirement Administration Service Center (RASC). While we will get a thorough update on the RASC including performance metrics, we are pleased to lead off this year's conference with a focus on the other side of the retirement system. We will hear from Jagdeep Bachher, UC's Chief Investment Officer, on the recent performance of the retirement system's investments. This will be followed by a brief update from the system's actuaries who will report on how well funded the system is currently (spoiler alert: there has been steady improvement). A staff presentation will follow on new outreach and educational tools for prospective and current retirees. As Chair of CUCRA, I have a seat on the UC Retirement System Advisory Board. I leave these meetings with a consistent belief that the funds are managed by an exceptionally talented and competent team with the principle of keeping the long view of investment returns in mind.

Administrative updates

Following an overview of this year's Joint Benefits Committee report, UC leaders will provide an overview of activities including a series of studies underway including total remuneration and a survey on desired health insurance benefits. We will also be briefed on the coming open enrollment period for health insurance and changes to rates and co-pays. We will be joined in-person by newly appointed Senior Executive Director for Benefits, Maynard Jankins.

Of course, no conference is complete without an update on the performance of the RASC. Executive Director Bernadette Green will present a report on the unit's operations. Bernadette will be leaving UC at the end of the year. Many of us have collaborated closely with her as she undertook actions to rebuild this essential function in service to retirees. While more work is to be done, we acknowledge the extraordinary progress she made in improving this service-based unit.

CUCRA Session--Wednesday morning

Summer Sessions

Many of you participated in our "Summer Sessions." Hosted by UC Irvine and then UC Berkeley (or is it now Cal or just Berkeley...?). I found these in-person

sessions engaging. One issue that emerged was campus and lab associations having difficulty recruiting new board members. This will be discussed at our CUCRA session on Wednesday morning. We will also ask if members believe these summer sessions have value and if they should be scheduled again next year.

CUCRA Survey

Also, at our CUCRA-only session we will receive an update on our triannual retiree survey which is underway. Led by former UC Berkeley Retiree Center Director Patrick Cullinane, the project seems to have had a successful launch. We will learn about survey response rates and plans for publication and distribution of the survey.

Retiree email addresses

Related to the survey process, but also part of a larger issue, we will speak with RASC Manager (and recalled retiree) Richard Townsend on efforts to gain access to retiree email addresses for outreach. Some may recall that in the new retirement software system, new retirees can “opt in” to share their email address with local associations. It is unclear, however, whether those opting in have ever been shared by UCOP with local associations.

JBC By Laws Amendment

At our last conference we reviewed a draft by laws amendment designed primarily to make some administrative changes to the Joint Benefits Committee (e.g., terms of service, voting rights, etc.). The measure now returns for a formal vote. The amendment also contains some minor clean-up issues and clarifications.

A CLOSING THOUGHT

During my time in service to CUCRA I remain impressed by the talent and energy of campus and lab volunteers who advocate and celebrate on behalf of retirees. This combined with the talented staff at retiree centers creates a powerful coalition to serve and advocate for our constituents. Many of us have the time, ability and good health to volunteer in support of retirees. Let us keep in mind that we are also advocating for the less fortunate who have modest pensions and significant health challenges. Our activities are not self-serving. We must continue to work with our colleagues at UCOP to focus on the stewardship responsibilities we have to ensure promises made for a financially secure and healthy retirement are realized.

Hoping to see many of you soon in-person or virtually at the upcoming conference.