

*Executive Committee*

*Sue Abeles (UCLA), Chair*

*Elise Woods, (UCB) Secretary*

*John Dahl (UCLA), Treasurer*

*Pat Price (UCI), Information Officer*

*John Meyer (UCD), Past Chair*

April 7, 2025

An Update to Our Membership: April 2025

From Sue Abeles, Chair, CUCRA

## 1. ERAC Update

The Emeriti/Retiree Advisory Committee (ERAC) has bimonthly meetings scheduled through 2025. The first meeting was held on February 18. Bill Perez, the new Executive Director of the RASC replacing Bernadette Green was introduced. The agenda included a discussion of the Return to Active Duty (RTAD) policy and plans for counseling prospective retirees who may be affected, status of VIA benefits funding increase request, status of various Requests for Proposals (RFPs), an update from the RASC, re-establishing bimonthly meetings with the RASC, and information regarding the newly formed Benefits Survey

Workgroup and the Remuneration Study Workgroup. With regard to the latter, we expressed concern that neither CUCRA nor CUCEA is represented on either of these workgroups despite having representatives that participated in the RFP process. The response from Vice President Cheryl Lloyd and her staff was that the focus of these efforts is on current employees and that there is staff and faculty representation on both groups. We pointed out that the Benefits Survey RFP included surveying the out-of-state retirees using VIA Benefits. It was acknowledged that this survey would follow at a later date and that there would be representation from CUCRA and CUCEA at that time. Cheryl also indicated that she was discussing a possible increase in the VIA benefits funding with others at the Office of the President for 2026. She further indicated that she would work with Bill Perez to reinstate bimonthly meetings with the RASC and the leadership of CUCRA and CUCEA.

## 2. Return to Active Duty Policy (RTAD)

The University recently issued a policy that affects the health benefits of those retirees and emeriti that return to active duty

(e.g., recall status) and are benefit-eligible. The policy was promulgated to comply with the Affordable Care Act and Medicare rules. Implementation of the policy will impact those retiring during this July cycle who return on recall status prior to a six-month hiatus and those who have already retired and continue working on recall more than a threshold number of hours, as reviewed on an annual basis.

Information about the policy and its implications for retirees and emeriti are outlined on UCNet at [New benefits eligibility rules for rehired retirees | UCnet](#). CUCRA and CUCEA have representatives on the work group tasked with the policy implementation. Both representatives have been very vocal about the lack of clarity in many of the communications, the adequacy of the training, and have expressed concerns that the policy and implications for retirees and their departments have not been disseminated effectively in every location. The Joint Benefits Committee Spring, 2025 report also addressed concerns regarding the rollout and offered suggestions to improve the process for retirees/emeriti.

### 3. RASC Update

The RASC provided an update on their performance at the February UCRS Advisory Board meeting. As indicated in the Joint Benefits Committee Spring, 2025 report, the information shared at that meeting indicates the RASC continues to make improvements in timeliness of answering incoming calls and retirement processing, but timely survivor processing continues to be an issue. The UCRS Advisory Board has asked the RASC to address the concerns about timeliness of survivor processing at their upcoming meeting in June and to explain the types of issues and requirements that cause delays in processing to see how improvements can be made. The Joint Benefits Committee Spring, 2025 report also addressed these concerns. A recommendation has been made that information about the survivor process be made available to prospective retirees at the time of their retirement and that a checklist be developed for retirees and survivors to prepare them for what information is required to complete the process in a timely manner.

### 4. Dental Request for Proposal (RFP)

A RFP for dental services is underway. Dianne Gregory of UC Davis is representing CUCRA on the workgroup.

## ADMINISTRATIVE MATTERS

### CUCRA Webmaster

I am pleased to announce that CUCRA has successfully recruited a new Webmaster. A special thank you to the UC San Diego Retirees Association for placing an ad in their retiree newsletter, which is how we learned that Larry Hull, a retired computer specialist from UCSD was interested in serving in this capacity for CUCRA. In keeping with the Bylaws and Standing Rules, at the Spring meeting we will formally vote to approve his joining the CUCRA Executive Committee as Webmaster. His resume accompanies this report for your review in preparation for the meeting.

Nominations committee: At the upcoming Spring meeting, Vice Chair Emily Galindo will be seeking volunteers for a Nominations Committee for positions subject to election at our Fall meeting. Officer positions subject to election include

Treasurer, Information Officer, Webmaster, and one of the Joint Benefits Committee Representatives.

Retiree survey: The CUCRA Retiree Survey Committee has been working diligently to review and report on the survey results. Patrick Cullinane, the Committee Chair, will provide an update on the status of the project at our Spring meeting.

Financial Update: At our meeting, David Olson, who has completed an audit of CUCRA 2023 and 2024 financials will report on his findings. Also, Treasurer John Dahl will provide an overview of CUCRA finances and the grants that are in process to associations. He will be distributing the financial reports under separate cover. Please review these materials in advance as it is part of our fiduciary responsibility to ensure council members have an awareness of our organization's finances and understand how funds are allocated.

Travel Program: As you will see in John's financial reports, the Travel Program continues to make a significant financial contribution to CUCRA that allows us to make grants to our

member associations. The Travel Program report for the Spring meeting was recently posted at the CUCRA website, which highlights the available trips for 2025 and 2026.

Summer Sessions: We plan again to offer informal summer meetings in both northern and southern California in July if there is interest by the membership. We will discuss this topic at our Spring meeting and identify dates and locations, as appropriate, for each session after our upcoming conference.