

## UCSF CUCRA Annual Report 2024-25

The major news of the past year is that after a concerted and collaborative effort on the part of members of the UCSF Retirees and Emeriti Associations, a proposal was submitted to the UCSF Chancellor to establish a permanent UCSF Retirement Center that would be staffed appropriately to serve the many and varied needs of the over 9,000 current UCSF retirees. The proposal has been undergoing the budgetary review and organizational analysis by the Chancellor's staff and a final recommendation was expected in early 2025. However, the tumult in Washington has caused any new funding requirements to be put on hold until issues related to support of higher education and research settle down.

During the past year, though, a number of events, including hikes, field trips, museum visits, and social events were conducted as shown below:

Guided Tour of the Marine Mammal Ctr	
Buck Institute for Research & Aging Tour	02/22/24
Fidelity Investments Workshop – UCSFRA Board featured	03/28/24
Alumni Weekend invite	04/12/24
Docent Tour of SF Botanical Gardens	04/17/24
Docent Tour of SF Chinatown	05/15/24
Acute Care for Elders and the Age-Friendly Health System presentation by UCSF Geriatric faculty	05/29/24
UCSFRA Spring Luncheon	06/04/24
Summer Series: The Memoir Project overview	06/12/24
Summer Series: The Memoir Project Part I	07/11/24
Tour of Oracle Park	07/17/24
2024 Merola Opera performance - Don Giovannii	07/30/24
Home Match Workshop	08/07/24
Tour of Andy Goldsworthy's Art Installations Presidio	08/09/24
2024 Merola Opera - Grand Finale performance	08/17/24
Summer Series: The Memoir Project Part II	08/21/24
Summer Picnic at SPARK Social SF	08/23/24
Summer Series: The Memoir Project Part III	08/28/24
Tour of Outdoor Art Club	09/04/24

Implementation of an Age-Friendly Emergency Dept Program	09/25/24
New UCSF Retirees Reception & Information Fair	10/09/24
Tour of Salesforce Transit Center and Rooftop Park	10/16/24
Tour of USGS Bay Model Visitor Center	11/06/24
Health Effects on Social Isolation and Loneliness presentation	11/20/24
UCSFRA Holiday Lunch 2024	12/03/24
Research initiatives @ UCSF Institute on Health & Aging: Music and Dementia presentation	12/04/24

### **UCSFRA 2024 Survey Summary Report**

The 2024 UCSFRA Survey, similar to one issued by CUCRA, but more focused on San Francisco issues, was distributed in June 2024, to approximately 3,000 retirees for the purpose of better understanding their interests and how best to serve them. There were 211 respondents.

The responses provided valuable information and are summarized as follows:

Most of our respondents are paying members, retired within the last 15 years and had long term careers so have an ongoing vested interest in UCSF. The Retiree Association acts as a conduit to keep them informed and engaged. Half of our respondents live in San Francisco or less than 15 miles from UCSF. The majority are willing to travel up to 25 miles to attend in-person events and activities. They like the option of hybrid participation (combined in-person and online) for our educational programs. In-person helps build community. Most are willing to pay up to \$20 to attend events offered.

There's great interest in educational and cultural events across a wide variety of topics such as finance, travel, performing art shows and museums. The majority of respondents are Facebook and YouTube users. Many volunteer and will benefit from our initiative in process to develop an electronic bulletin board announcing opportunities in San Francisco and the greater bay area. Almost all respondents expressed a strong need for a UCSF central point of contact for retirement issues. Many commented on the need for RASC to improve in several areas, including

response times, consistency of information, and follow-up procedures. Addressing these issues could enhance the overall retiree experience and ensure that they feel supported and well informed.

*UCSFRA 2024 Survey Summary:*

**Has there been a need to reach out to the UC Retirement Administration Service Center (RASC) for assistance regarding retirement benefits or services? Can you share the general topic of the request? Were you satisfied with the service?**

There are a lot of mixed experiences with RASC (Retirement Administration Service Center) among retirees, with a wide range of issues reported. Here's a summary of the key points and common themes from the feedback:

1. **Communication Issues:** Many retirees reported difficulties with communication, including long wait times on the phone, unreturned calls, and inconsistent or conflicting information from different representatives.
2. **Service Quality:** There were several mentions of unsatisfactory service, particularly concerning retirement paperwork processing, benefits information, and dealing with post-retirement issues such as insurance changes and tax information.
3. **Technical Problems:** Issues with accessing accounts, password resets, and technical support were noted, with some finding the process to be smooth and others facing significant hurdles.
4. **Health Insurance and Benefits:** Problems were reported with health insurance coverage, changes during open enrollment, and handling Medicare transitions. There were also specific grievances about dental plans and lack of helpful information regarding health benefits.
5. **Follow-Up and Support:** Several respondents were dissatisfied with the follow-up they received after reporting issues or requesting assistance, and some had problems with specific services like Experian credit monitoring or Federal withholding adjustments.
6. **Staff Changes:** The impact of staff turnover and the effectiveness of new or temporary staff were highlighted as factors affecting the quality of service.

7. General Satisfaction: While some retirees were satisfied with the overall service or found the staff to be helpful, there were notable instances of frustration due to delays, errors, and the need for better support systems. It seems like there's a need for RASC to improve in several areas, including response times, consistency of information, and follow-up procedures. Addressing these issues could enhance the overall retiree experience and ensure that retirees feel supported and well-informed.

### **New Retirees Reception & Information Fair**

**We had a very successful fair in September 2024 with close to 80 attendees, as well as our community partners and staff participants. We received many appreciative remarks from the new retirees about the content of the program and they welcomed the chance to speak with board members about our activities. It provided an opportunity for us to showcase the breadth and depth of our efforts to advocate on behalf of our membership.**

**I wanted to thank all of you who attended, and especially those of you who volunteered to help with the event.**

**And finally, to note the tenth anniversary of this event, a special thanks to Gail Harden and Sandra Norberg who have spearheaded the direction of this event for several years were instrumental in getting this program off the ground. It has become a highlight of our efforts to help retirees find their way as they begin the next chapter of their lives.**

Beyond this, members of the Retirees Association board participated on the twice-yearly Pathway to Retirement weeklong series presented by UCSF and Fidelity to provide a forum for employees that are interested in retirement to get a full multi-day series of briefings on healthcare, retirement financial planning among a wide range of topics. There was also the continued participation on the Lunch Speaker series conducted by the UCSF Emeriti members on a broad range of science and health issues, in addition to a standing UCSF Covid 19 Response Town Hall.

Also, several UCSF retirees became UC Travel Program “guides” and led a number of trips this past year including Ireland, Cuba, Iceland, Costa Rica, Tunisia, Japan and Sicily. Many more trips are planned to complete 2023 and for 2024.

The membership held its annual December holiday luncheon with about 80 in attendance for a festive end to the 2023 year. To start 2024, tours of the Marine Mammal Center in Sausalito and the Golden Gate National Recreation Area, as well as a tour of the Buck Institute on Aging in Marin County were held to start the 2024 year.

Finally, the membership push this past year saw some good results in Retiree Association paid members and we hope to build upon that and continue to grow once a new UCSF Retiree Center is established. Having full-time support will help tremendously in that effort. While the official membership year ends on October 31<sup>st</sup>, we were able to grow to 550 paid members. A New Retirees Welcome event was held in September with 50 new UCSF retirees attending for an agenda that included a welcoming presentation from the current UCSF Associate Vice Chancellor of Human Resources, the Emeriti Association Vice President, representatives from Fidelity, the UCSF Health Care Facilitator, the President of the UCSF Retirees Association and representatives from the UCSF Institute on Aging, the Osher Center for Lifelong Learning, UCSF Fitness and Recreation Programs, the Speaker Series, and the UC Travel Program.

Up for discussion during the next year will be a new funding model for the Associations (Retiree and Emeriti), the final green-light decision on the new UCSF retirement center and UCSF hosting of the Fall 2025 UC-Wide CUCEA AND CUCRA Conference.