

Final

2/17/2026

Council of University of California Retiree Associations (CUCRA)

October 30, 2025

8:30 a.m. – 12 noon

Fall Meeting

Zoom Meeting hosted by UC San Francisco

ATTENDEES:

UC Berkeley: Paul Brooks, Marian Gade, Javier Gonzales, Camille Koue, Elise Woods

UC Davis: Juliane Crowley, ML Farrell, Emily Galindo, Dianne Gregory, Darlene Hunter, John Meyer, Darlene Mundy, Narriman Shahrokh

UC Irvine: Cindy Fern, Mary Garcia, Jill Halvaks, Emil Nguyen, Pat Price, Marianne Schnaubelt, Jill Vidas

UC Los Angeles: Sue Abeles, Sue Barnes, John Dahl, Ayesha Dixon, Jack Powazek, Judith Tuch

UC Merced: Not represented

UC Riverside: Robert Daly, Sheryl Hayes, Cristina Otegui, Andy Plumley

UC San Diego: Larissa Foggiano, Larry Hull, Kim Signoret-Paar, Nancy Wilson

UC San Francisco: Brian Coe (ETS Tech), E. Eastman, Gail Harden, Eric Vermillion, Louis Gutierrez (Alumni Relations), Luanne Mullin, Susan O'Hara, Stephanie Yee,

UC Santa Barbara: George Hopwood, Julie Luera, Robert Mann, Kim Summerfield

UC Santa Cruz: Christy Dawley, Lee Duffus, Bill Parro, Frank Trueba, Stacey Sketo-Rosener, Esther Sylvan

UCOP: Jim Dolgonas, Jon Good, Steven Matthews

LANL: Not Represented

LBNL: Nancy Brown

LLNL: Jeff Garberson

Welcome:

Sue Abeles, the Chair, called the meeting to order at 8:30 a.m. and welcomed the attendees. She reviewed the agenda and conducted introductions of those attending.

Approval of Minutes

Elise Woods presented the minutes from the April 24, 2025 meeting. The minutes were reviewed and accepted at 8:49 a.m., followed by formal approval.

Acceptance of Fall 2025 JBC Report

Sue Abeles, Chair, led a vote to accept the Fall 2025 JBC Report. The report was accepted and approved at 8:50 a.m.

Chair's Report

Executive Committee Update

Sue Abeles provided an overview of the Executive Committee's written update. She noted that Calvin Turner would be reporting directly to Rachel Nava. This change raised concerns about possible breakdowns in communication between RASC and UCPATH. Sue and Joel requested inclusion in the search process for the Vice President-Systemwide Human Resources, with the opportunity to serve on the interview committee. The potential impact on ERAC membership was discussed. It was suggested that RASC would attend as guests. Jim Dolgonas inquired whether Sue Abeles had been contacted regarding the selection of finalists, which is expected to happen at the end of the year.

Benefit Updates and Equity Issues

The Office of the President announced an increase in the Via Benefits program annual allocation from \$3,000 to \$4,000—a 33% increase, marking the first adjustment since the inception of the program in 2014. The JBC report highlighted equity issues between in-state and out-of-state retirees regarding benefits. There may be future opportunities for out-of-state retirees to join senior advantage programs currently offered to in-state retirees; an RFP is being considered to address this.

RASC Outreach Initiatives

RASC is working on strategies to collect retiree email addresses to improve outreach and communication.

Vice Chair's Report

Officer Election Results

Emily Galindo, Vice Chair, assisted by Jon Good and Andy Plumley, announced the results of the officer elections: Jim Dolgonas was elected as JBC representative, Andy Plumley as Treasurer, Pat Price as Information Officer, and Larry Hull as Webmaster. Eric Vermillion is stepping down from JBC, and Sue expressed gratitude for his service and contributions.

New Member Orientation

Marianne Schnaubelt reported on the new member orientation, noting it was the largest group to date with 12-13 participants. She hopes the session was useful and thanked Emily Galindo for highlighting key

issues CUCRA would address at the meeting. Emily appreciated the participation and received valuable feedback. Sue requested attendees submit additional feedback to help improve future sessions.

Treasurer's Report

Financial Projections and Program Updates

The CUCRA Treasurer's Report was emailed on October 26, 2025, to the CUCRA Council prior to CUCRA's Fall 2025 Meeting. The following reports were included: (1) Executive Summary, (2) Management Report as of September 20, 2025 (actual), (3) Management Report as of December 31, 2025 (projected), (4) Approved 2025 Budget, (5) Proposed 2026 Budget, and (6) projected March 2026 Grant Allocations to Retiree Associations.

The Treasurer reviewed in summary the September 30th actuals and then in detail reviewed the December 31st projected asset holdings and financial activity by highlighting the core sections, which included dues income, officers' travel for the year, and minimal other costs. Next, he reviewed the discretionary section, which included the travel program (both income and expenditures), CUCRA Survey costs, and host campus support. A Variance Report and Seven-Year Financial Trend Report were presented too. CDs were earning 4.3%.

CUCRA should end Calendar Year 2025 in good financial health, but it will be less than 2024 because of higher travel costs due to conference location and participation at summer meetings; increased costs for printing materials, postage, scanning audit materials; one-time contribution; higher costs for host campus support, and periodic cost to publish the CUCRA survey.

The 2026 Proposed CUCRA Budget was presented to the Council for approval. Two budgets were presented: (1) Hybrid (Sp) and Zoom (Fall) and (2) Hybrid (Sp) and Hybrid (Fall). Although it was discussed in the past to have the Hybrid/Zoom format (1), there was still interest in the Hybrid x 2 format (2). The difference is greater costs in core travel and additional host campus support. The offset to such increased costs results in less grant allocations being awarded to the member retiree associations.

Thus, a motion to approve the Hybrid (Sp) and Zoom (Fall) format of the 2026 Proposed CUCRA Budget was made and accepted by the Council. This more than likely will be the conference format in the future.

The Treasurer next presented a projected Grant Allocations Report, commenting that this report generates the most interest but is dependent on the other reports to produce. The grant allocation awards in 2026, based on 2025 financial activity and projected 2026 financial reserve totals, will again be substantial this year but less than the prior year for reasons already given when reviewing the projected 2025 financial report above: higher travel costs, increased printing/scanning costs, greater postage expense, more host campus support, and cost to publish the periodic CUCRA Survey. The last report in this section was a new historical report showing four years of grants allocated to the retiree associations.

The Retiree Count Report was not ready to present at this meeting, but it was not expected that any retiree association would move to a different tier, creating a change in annual fees for 2026. The 2026 budget was presented and approved without dissent. Grant allocations for the first quarter of 2026 are projected at \$66,856, reduced due to lower travel income and higher survey and officer travel expenses.

Discussion on Hybrid Meetings and Grant Allocations

Bob Daly raised the possibility of holding two hybrid meetings per year, suggesting this could reduce grant allocations. He asked for input from association presidents, noting that some campuses have difficulty hosting hybrid meetings due to the \$20,000 additional expense. John Meyer commented that summer meetings provide valuable in-person interaction, but hybrids might burden the hosting campus. Jack Powazek agreed that the current mix of hybrid, Zoom, and summer meetings is effective.

One hybrid and one Zoom meeting per year would not burden the associations or the budget. Marianne mentioned increased comfort with Zoom, and Emily noted that over 170 participants attended the recent Zoom meeting, which would not be possible in person. Andy Plumley emphasized the need to consider scheduling for in-person and summer meetings. Kim Signoret-Paar supported the hybrid and Zoom combination, and Judith Tuch suggested using Zoom breakout groups to enhance interaction. Bob moved to approve the hybrid Zoom format, with Judith seconding.

Honorary Membership and Recognition

Sue presented John Dahl with an honorary gift in appreciation of his 14 years of service to CUCRA, including a gift card (and an orange jumpsuit which he was wearing). John expressed gratitude for the opportunity to give back to UC and described his work with CUCRA as highly rewarding. The Board awarded John Dahl honorary membership in CUCRA, with Marian Gade welcoming him as the third honorary member, alongside Adrian Harris.

Information Officer's Update

Pat Price, Information Officer, expressed appreciation for the feedback and responses to her information requests and was pleased to connect faces with names.

Webmaster's Update

Larry Hull, Webmaster, presented a slideshow showcasing the CUCRA website. He thanked Bob Daly for his previous expertise and maintenance. The website is stable, current, and open to feedback and comments. Larry reviewed the tabs on the search bar, highlighted the travel section maintained by Sue Barnes, and demonstrated the website's search tool. He also presented a summary of CUCRA's mission.

Break

The meeting was ahead of schedule and recessed at 9:46 a.m., resuming at 10:00 a.m.

Policy Matters

CUCRA Survey Committee Recommendations

The Survey Committee recommended establishing a standing committee, which would require changing CUCRA's bylaws. Jim Dolgonas asked about the rationale and purpose of such a committee. The committee would address inclusion of retirees who receive lump sum payouts, currently not in the survey population, and continue efforts to obtain financial contribution data from UC Development offices at the locations.

Marianne Schnaubelt supported the recommendation, suggesting that refining survey questions and hiring someone to manage the process—rather than relying solely on volunteers—would improve quality and scheduling. Judith Tuch emphasized that some initiatives should go beyond the survey itself, noting that collecting emails from lump sum retirees is time-consuming and that committee members need time to ramp up and prepare.

Bob Daly noted the value in having a standing committee to evaluate survey questions and extend committee tenure to increase expertise. Jim Dolgonas proposed defining committee criteria, terms, and duties, potentially modeling it after the nominations committee. Patrick was praised for his leadership and suggested as permanent chair.

Luanne Mullin expressed appreciation for the survey's insights. The committee discussed funding the survey, noting \$11,000 in expenses this year, with UCLA support and mailing costs. John Meyer saw merit in a standing committee, highlighting the value of top-level survey headlines for campus leadership. Suggestions included campus funding and gathering feedback from chancellors and provosts. Kim Signoret-Paar noted challenges in capturing development data, and John Dahl compared costs from previous surveys, emphasizing the benefit of expertise and volunteer lead time.

Jon Good discussed tangential issues such as development and email access. Marianne recounted the evolution of survey management, noting CUCRA's tradition of work-sharing. Nari Shahrokh supported the standing committee, citing challenges in data collection and the need for better guidance. Sue Barnes described difficulties obtaining development data. Judith Tuch highlighted the importance of reporting research grants and donations from retiree associations.

Sue Abeles supported forming an ad-hoc committee and called for volunteers. Robb Mann suggested hiring administrative support to ensure continuity, and John Dahl raised questions about honorarium versus compensation for IRS purposes.

Other Matters

UC Emeriti-Retiree Advisory Committee

RASC is using CEM Benchmarking to benchmark with relevant cohorts, they are also working to redefine their organizational structure, with the aim to become best in class. Maynard Jenkins and Susan Pon-Gee expressed interest in having CUCRA and CUCEA representatives participating early in RFPs, and Paul Brooks indicated RASC is reviewing its own data but lacks customer survey results. Sue stated that RASC

will be surveying constituents. Frank Trueba supported early CUCRA involvement in RFPs, and Jim Dolgonas encouraged Sue to reach out to Maynard Jenkins to confirm the intent to include CUCRA and CUCEA representatives in these meetings. Jon Good noted that UC can be selective about committee membership.

Unified HR Verifications

UC conducts unified HR verifications every three years, saving \$23 million in 2017. Concerns were raised about confirmation processes for verified individuals. Emily Galindo received her verification letter, but not all did.

Travel Insurance and Program Access

Cheryl Lloyd confirmed retiree access to UC's travel program, with blue and gold policies available for purchase. Sue Barnes noted that travel documentation always includes relevant links, though coverage may differ from that offered by travel agencies. Updates on retiree access to Connexus are not yet available. Elise Woods stated that increased retiree participation would benefit university contracts.

Fidelity Contract Renewal

CUCRA has requested involvement in the upcoming Fidelity contract RFP.

IT Issues and Retiree Inclusion

Sue Abeles solicited feedback on Van and Monte's IT presentation; Van Johnson was open to including retirees in planning. Frank considered the discussion positive, and Luanne highlighted retirees' expertise and support for UC. Bob Daly felt the presentation was geared toward Regents rather than retirees. Jim Dolgonas noted that Van Williams invited Sue Abeles and Joel Dimsdale to a November meeting with campus CIOs, and Sue sent the CUCRA survey to Van and Monte. Jon Good wished for more detail on AI benefits, while Dianne Gregory and Frank Trueba stressed the importance of retiree feedback. IT issues have impacted survey data collection.

Return to Active Duty (RTAD)

Jack Powazek, serving on the UCOP committee, reported disproportionate recall numbers between emeriti and staff (8:1 ratio), with few staff issues. Sue Abeles said UCPATH could not provide historical data on rehired retired emeriti and staff.

Dental RFP Update – Delta Dental

Dianne Gregory and Frank Trueba advocated for a dental "buy up" plan. The maximum benefit increased from \$1,500 to \$2,000. The program remains supplemental and is not equivalent to health insurance.

RASC Performance Metrics and Operations

Other matters related to the JBC report were discussed, including follow-up on open enrollment information. Medical costs are rising across programs, but rumors about United Healthcare leaving Southern California next year are unfounded.

Assessment of 2025 Summer Session Meetings

Plans are in place to continue summer session meetings, as members find them valuable.

Association/Retiree Center Conversation

Open Forum on Retiree Center Issues

The open forum covered tools such as Wild Apricot and Constant Contact for managing email lists. UCLA's Ayesha Dixon and Judith Tuch discussed their campus' experiences. Using common products provides leverage with vendors and enables membership discounts. Constant Contact is widely used by retiree centers, while Wild Apricot is favored for membership management. Some campuses use Salesforce for database and donation management, though it is more expensive than Wild Apricot.

Marianne Schnaubelt reviewed which survey aspects were most valuable and how reports have been shared. Jill Halvaks sent links to campus administration and will meet with the Provost in November to discuss the survey. At Irvine, the provost spoke at the emeriti retiree reception, and CUCEA members met with each dean. At Davis, packets were sent to each dean, and Emily Galindo met with the chancellor's leadership team to discuss gift figures. Andy Plumley met with the new chancellor and HR VC, while Bill Parro (UCSC) discussed donation data with campus leaders, emphasizing connections.

Judith Tuch announced plans to send the report to UCLA, highlighting campus-specific information. Nancy Wilson at UCSD sent their report to campus leadership and expects to meet in November. Efforts are underway at UCSF to create a dissemination list. At UCSB, the new chancellor is being approached to discuss development office numbers and volunteer opportunities.

Emily Galindo (UCD) requested additional space for the Sacramento campus retiree center, which was well received. Judith identified untapped potential, noting that 26% of retirees are unaware of volunteer opportunities, which she plans to address with the chancellor. Luanne Mullin suggested expanding the encore career section of the survey, emphasizing retirees' leadership, advocacy, and community involvement.

Sue Abeles adjourned the meeting at 12:00 pm.

Respectfully submitted,

Elise J Woods

Elise J. Woods, Acting Secretary